Workforce Administration Manual v9.1 October 1, 2011

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Workforce Administration Manual

Effective Dating
The **Effective Date** indicates when an action or event is in effect or valid. Each employee record is effective dated. PeopleSoft is designed to automatically perform certain functions based on the Effective Date. Effective Dating provides a mechanism for determining if a transaction is current, history, or future.

Some pages will display the word **Current, History, or Future** so you can always tell what type of transaction you are viewing. Every action taken on an employee will have an effective date. Because we have been in production for multiple fiscal years there may be more than one record associated with an employee. Future dated actions may be in the system but PeopleSoft does not act on that information until the actual day of the effective date.

Current: Closest to but not exceeding today's date.
Future: Greater than today's date.
History: Prior to current date effective date.

Note: It is very important to use the correct date for new hires, rehires, and terminations as these dates impact benefits and compensation.

Multiple Actions
It is necessary to use **Effective Sequencing** when more than one action occurs on the same **Effective Date**.

Example 1:
STEP 1: When an employee acquires a new dependent, the first entry (sequence **0**) inserted into the **Action/Reason** fields indicate the action of **Paid Leave of Absence** with a reason of **(FML) Paid FMLA Use Accrued Time**.

STEP 2: To enter a second event on the same effective date, click the **Add A Row** button to insert a new row. The second entry (sequence **1**) inserted into the **Action/Reason** fields indicate the action of **Family Status Change** with a reason of **(ACI) Acquire Dep Eff on Event Dt**.

Example 2:
STEP 1: When an employee is promoted within their own agency, the first entry (sequence **0**) inserted into the **Action/Reason** fields indicate the action of **Promotion** with a reason of **(PSA) Promotion - Same Agency**.

STEP 2: To enter a second event on the same effective date, click the **Add A Row** button to insert a new row. The second entry (sequence **1**) inserted into the **Action/Reason** fields indicate the action of **Pay Rate Change** with a reason of **(GSA) General Salary Adjustment**.

Position Data Override
This feature is most often used in positions utilizing an underfill system. An underfill system is when an employee must work and/or train to meet a position's job code qualification requirements. For example:

1. An **Accountant 1** position has a job code **002RA1**.

2. An **Accountant 2** position has a job code **002RA2**.

3. If a candidate is hired as an **Accountant 1** (job code **002RA1**) but needs additional training to meet the position's job code qualification requirements, the employee will be hired by the **Accountant 1** position control number (PCN) located on the **Work Location** tab.

4. However, the job code number on the **Job Information** tab represents the job code qualification requirements of an **Accountant 2** position (job code **002RA2**) until the employee fulfills the qualifications of the **Accountant 1** position.

The **Position Data Override** feature located on the **Work Location** tab may be used when the underfill position information (Accountant **2**) differs from the defaulted position information (Accountant **1**). The position information on the **Work Location** tab is established by the position control number (PCN) in the **Position Number** field. The PCN represents an individual position established by the job code qualification requirements (Accountant **1**).

Clicking the **Override Position Data** button on the **Work Location** tab changes the button text to **Use Position Data** activating the **Use Position Data** function allowing the underfill job code (Accountant **2**) to be entered on the **Job Information** tab.
The following fields on the **Job Information** tab may be changed as necessary:
- Job Code
- Full/Part
- Standard Hours
- FTE

Do not click the Override Position Data button if no data is actually being overridden.

After entering the override data, you must save the record with the **Use Position Data** button still displayed. This indicates that underfill position information (Accountant **2**) on the **Job Information** tab differs from the position information (Accountant **1**) on the **Work Location** tab. This information is needed for reporting purposes.

I MPORTANT: Never turn on the Position Data Override feature if none of the job information is different.

New Employees and Employee Rehires

Hires and rehires for agencies are required to apply to job postings in eRecruit. The selected candidate(s) will be prepared for hire in eRecruit and will appear on a Manage Hires list. The Manage Hires list will utilize application profile information to establish the workforce administration biographical and job data records.

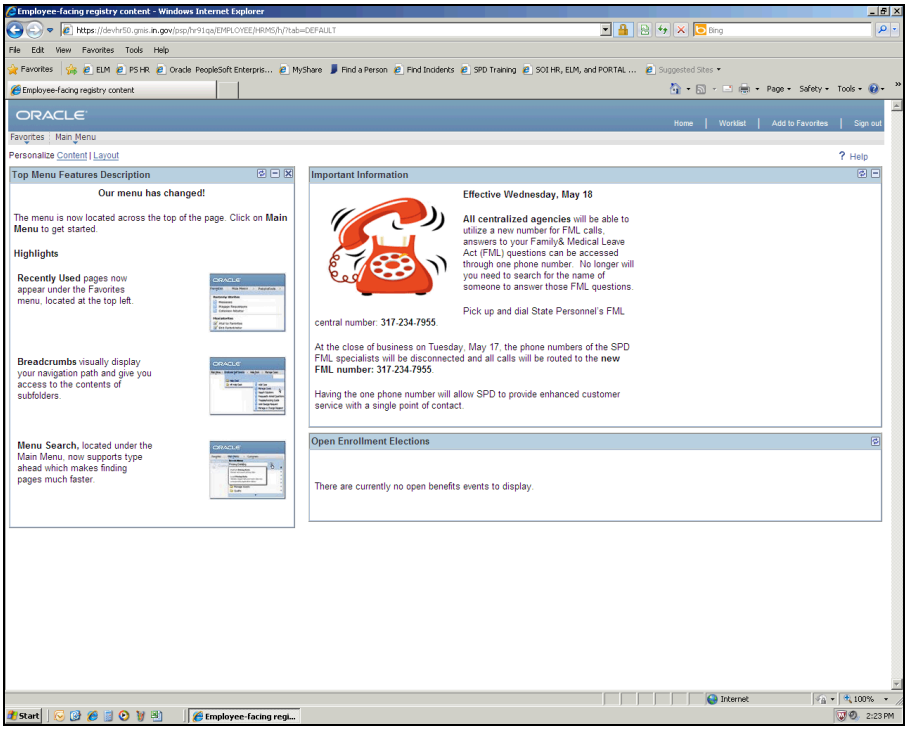
The use of eRecruit is at the discretion of the Hiring Manger for job bank exceptions, Quasi agencies and elected officials. Establishment of a requisition in these instances will allow the candidate to be tracked in eRecruit and appear on the Manage Hires list.

Employee job data records are established from information provided on a **Personnel Payroll Action Form (PPAF)**. A sample PPAF form and instructions for completing the PPAF can be located in the Supplemental Materials section under the Workforce Administration lessons. The supplemental documents are titled ***Personnel / Payroll Action Form*** and ***Filling Out the Personnel Payroll Action Form (PPAF)***.

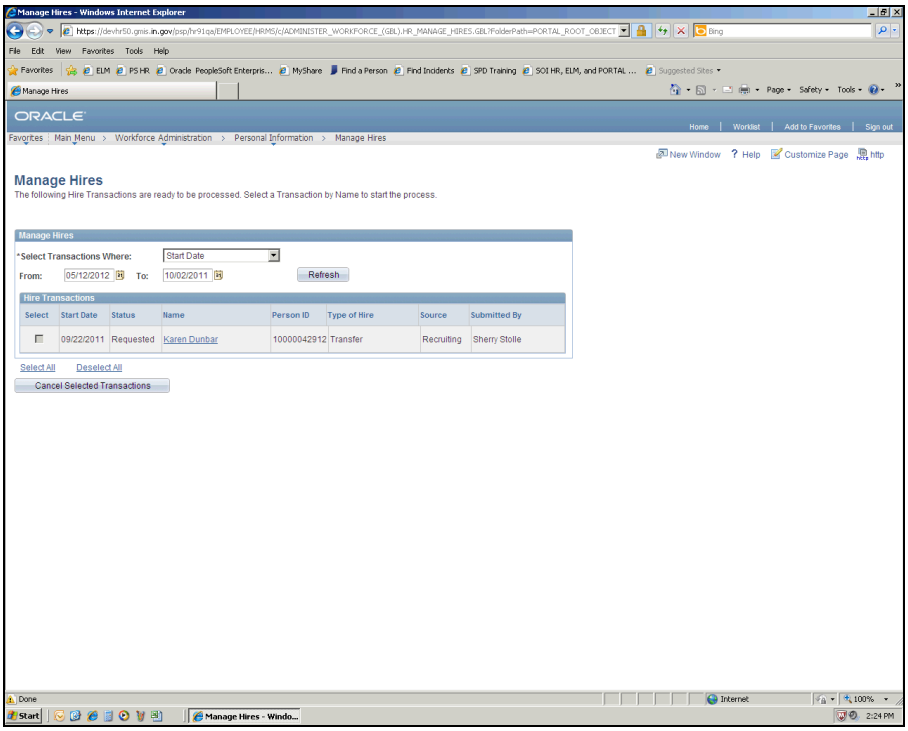
Do **NOT** click the **Save** button when entering biographical or job data record information until **ALL** record data has been entered.

Rehire in Manage Hires

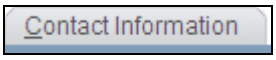
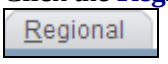
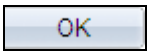
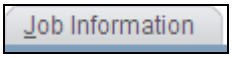
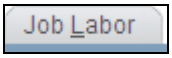
Procedure

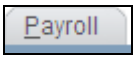
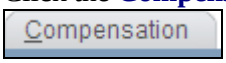
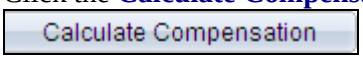
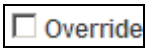
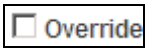
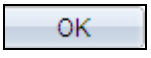


Step	Action
1.	Click the **Main Menu** link. Main Menu
2.	Point to the **Personal Information** menu.
3.	Click the **Manage Hires** link. Manage Hires



Step	Action
4.	Adjust the **From** and **To** fields to reflect the correct time frame. Enter the desired information into the **From** field. Enter "**5/12/2011**".
5.	Click the **Refresh** button. Refresh
6.	Click the **Name** link. Jessica Wetzel
7.	Confirm the following fields: **Type of Hire**: Shows the option Rehire. **Desired Start Date**: Indicates the Effective Date of Hire. **Employee ID Verified**: If active, click this link to confirm there is not another Employee ID number to avoid duplication. Click the scrollbar.
8.	Click the **Add Person** button. Add Person

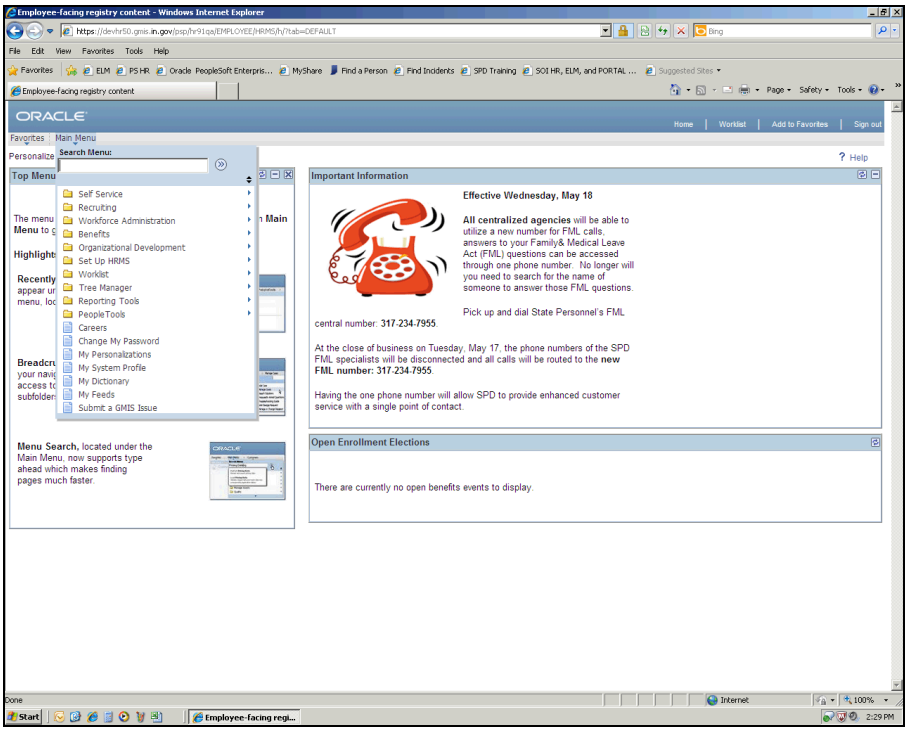
Step	Action
9.	Verify the **Effective Date** field reflects the effective date of rehire. If the employee's name is incorrect, you can click the **Edit Name** button to make those corrections. The employee's name in PeopleSoft should match what is on their Social Security card. Confirm that the **Date of Birth, Gender, Marital Status, Highest Education Level** and **National ID** fields are correct. Click the **Contact Information** tab. 
10.	Information on the **Contact Information** tab must be effective dated with the employee's effective date of hire. Remember to add rows to avoid overwriting employee history. Click the **Regional** tab. 
11.	Verify that the employee's ethnic group is recorded. Click on the **Ethnic Group** look up button to find and select the correct value. Click the **OK** button. 
12.	Scroll to the bottom of the page. Click the scrollbar.
13.	Click the **Add Job** button.
14.	The **Action** field will default to **Rehire.** Click the **Reason** list.
15.	Click the **Rehire - Replace** list item.
16.	Click the **Job Information** tab. 
17.	Change the value of the **Empl Class** field if necessary. Click the **Job Labor** tab. 
18.	The **Union Seniority Date** field will default to the employee's previous seniority date. This field is required (by all agencies) or benefits may be affected. Enter the most recent date of hire into this field. Enter the desired information into the **Union Seniority Date** field. Enter "**05/14/2011**".

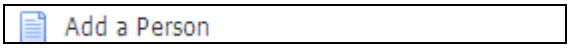
Step	Action
19.	Click the **Payroll** tab. 
20.	Confirm that the **Pay Group** field defaulted correctly. Click the **Compensation** tab. 
21.	Adjust the biweekly compensation rate if necessary. If the employee is hourly, select the appropriate value by clicking the **Rate Code Magnifying** Glass look up button. Click the **Calculate Compensation** button. 
22.	Click the **Employment Data** link.
23.	The **Company Seniority Date** is the equivalent of the accrual date. To change the **Company Seniority Date**... Click the **Override** option. 
24.	Enter the adjusted accrual date. **Note:** for assistance with this field, contact your payroll Specialist at SPD. Enter the desired information into the **Company Seniority Date** field. Enter "**05/14/2011**".
25.	Click the **Override** option. 
26.	The **Benefits Service Date** field should reflect the effective date of rehire. Enter the desired information into the **Benefits Service Date** field. Enter "**05/14/2011**".
27.	If appropriate, enter the correct date into the **Probation Date** field. Click the **Benefits Program Participation** link.
28.	Enter the BAS Group ID into the **BAS Group ID** field. Note: a list of BAS Group ID's can be found in the Benefits Manual Appendix. Click the **Look up BAS Group ID** button.
29.	Click the **OFC** link.
30.	Click the **OK** button. 

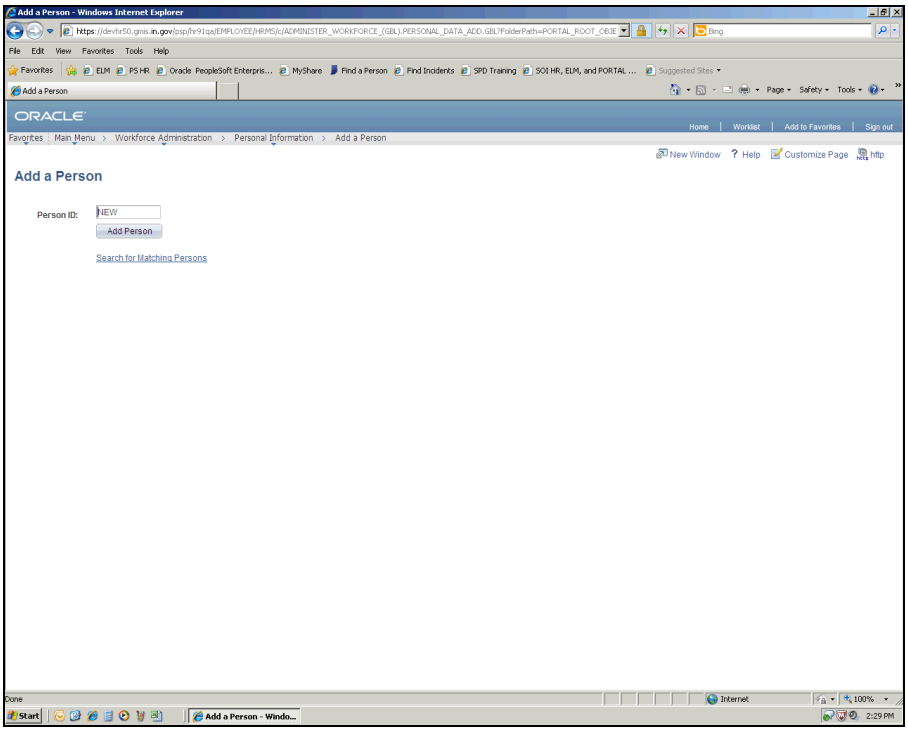
Step	Action
31.	**End of Procedure.**

New Hire (Direct)

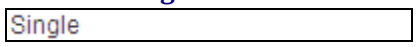
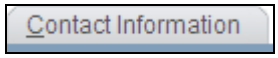
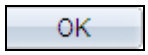
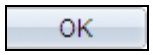
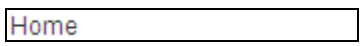
Procedure

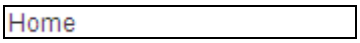
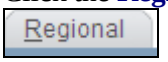
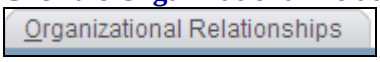
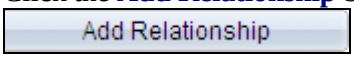
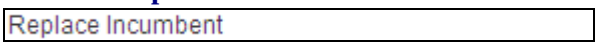
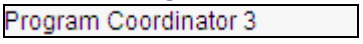
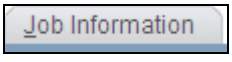


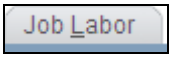
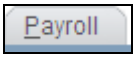
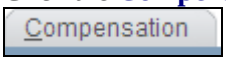
Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Click the **Add a Person** link. 



Step	Action
5.	Click the **Add Person** button. Add Person
6.	Click the **Add Name** button. Add Name
7.	The employee's name entered into PeopleSoft must match what is shown on their Social Security card. Enter the desired information into the **First Name** field. Enter "**John**".
8.	Enter the desired information into the **Middle Name** field. Enter "**Q.**".
9.	Enter the desired information into the **Last Name** field. Enter "**Doe**".
10.	Click the **OK** button. OK
11.	Enter the desired information into the **Date of Birth** field. Enter "**01/01/1976**".
12.	Click the **Gender** list. Unknown
13.	While **Unknown** is an available choice, you **must** select either **Female** or **Male.** Click the **Male** list item. Male
14.	Click the **Highest Education Level** list. A-Not Indicated
15.	Click the **I-Master's Level Degree** list item. I-Master's Level Degree

Step	Action
16.	Click the **Marital Status** list.
17.	Click the **Single** list item. 
18.	Enter the desired information into the **National ID** field. Enter "**111-22-3333**".
19.	Click the **Contact Information** tab. 
20.	Click the **Add Address Detail** link.
21.	Click the **Add Address** link.
22.	When making corrections to the employee's address, use the correct postal abbreviations. Do not use punctuation (ex: periods after abbreviations). To view a list of address abbreviations, go to **https://www.usps.com/ship/official-abbreviations.htm**. Enter the desired information into the **Address 1** field. Enter "**1234 Elm St.**".
23.	Enter the desired information into the **City** field. Enter "**Beech Grove**".
24.	Enter the desired information into the **State** field. Enter "**IN**".
25.	Enter the desired information into the **Postal** field. Enter "**46201**".
26.	Always confirm/enter the employee's county. Enter the desired information into the **County** field. Enter "**Marion**".
27.	Click the **OK** button. 
28.	Click the **OK** button. 
29.	Click the **Phone Type** list.
30.	Click the **Home** list item. 
31.	Enter the desired information into the **Telephone** field. Enter "**317-555-1212**".
32.	State Personnel will be utilizing home and business email addresses to contact employees in the future regarding important events (i.e. Open Enrollment). Please be sure to collect an email address from as many employees as possible. Click the **Email Type** list.

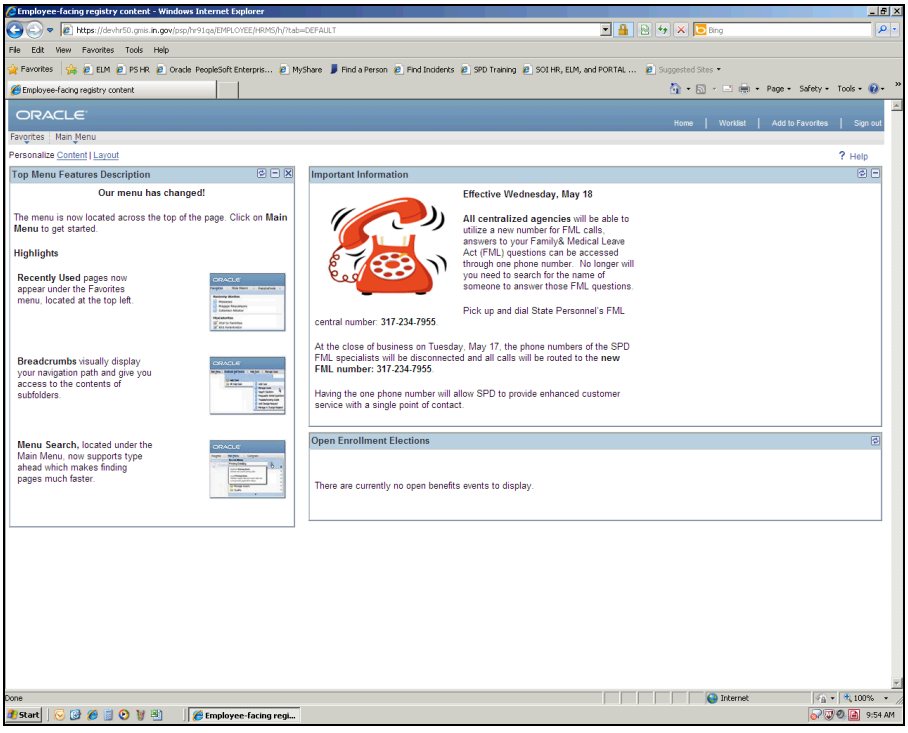
Step	Action
33.	Click the **Home** list item. 
34.	Enter the desired information into the **Email Address** field. Enter "**jdoe@msn.com**".
35.	Click the **Preferred** option.
36.	Click the **Regional** tab. 
37.	An employee's ethnic group is **REQUIRED.** If the ethnic group is not noted by the employee or the employee refuses to give this information, use a visual observation to make the best selection. If the **Ethnic Group** field is left as **Unknown,** EEO/AA reporting will be inaccurate. Click the **Look up Ethnic Group** button.
38.	Click the **White** link.
39.	Click the **Organizational Relationships** tab. 
40.	Click the **Employee** option.
41.	Click the **Add Relationship** button. 
42.	The **Empl ID** number is now available. Confirm that the **Effective Date** field reflects the **Effective Date of Hire**. Enter the desired information into the **Effective Date** field. Enter "**09/26/2011**".
43.	The **Action** field will default to **Hire**. Click the **Reason** list.
44.	Click the **Replace Incumbent** list item. 
45.	Enter the desired information into the **Position Number** field. Enter "**100654**".
46.	Click the **Program Coordinator 3** object. 
47.	Pressing the Tab key on the keyboard causes much of the position data to populate. Press **[Tab]**.
48.	Click the **Job Information** tab. 

Step	Action
49.	Click the **Empl Class** list.
50.	Select the designated status of the employee. The most common new hire statuses are: **Orig WT**: Agencies with classified employees use this status to activate the six-month working test probation period. **Quasi**: Quasi agencies. **Appointed**: Appointed positions. Click the **Orig WT** list item.
51.	Click the **Job Labor** tab. 
52.	The **Union Seniority Date** field indicates the employee's seniority date only. This field does not indicate membership in a union. This should be the employee's date of hire. Enter the desired information into the **Union Seniority Date** field. Enter "**09/26/2011**".
53.	Click the **Payroll** tab. 
54.	Verify that the correct pay group defaults into the employee's record (example: **PYA** is Pay Group A and **PYB** is Pay Group B). Click the **Compensation** tab. 
55.	If the employee's starting salary is above the minimum of the hiring range, enter the adjusted compensation rate into the **Comp Rate** field. Enter the desired information into the **Comp Rate** field. Enter "**2500**".
56.	Click the **Calculate Compensation** button.
57.	Click the **Employment Data** link.
58.	Confirm the **Company Seniority Date** and the **Benefits Service Date** fields are accurate. An inaccurate **Benefits Service Date** may impact the availability of employee benefits. Enter the employee's probation date into the **Probation Date** field. (The probation date is six months from the date of hire) An inaccurate probation date may impact the availability of employee benefits. Enter the desired information into the **Probation Date** field. Enter "**03/26/2012**".

Step	Action
59.	Click the **Benefits Program Participation** link. Benefits Program Participation
60.	Select the correct **BAS Group ID**. BAS is the Benefits Administration Selection schedule for the agency. Click the **Look up BAS Group ID** button.
61.	Click the **Regular Employees Group 1** link. Regular Employees Group 1
62.	Confirm that the **Effective Date** is correct and write the **Empl ID** number from the top of the screen on the Personnel Payroll Action Form (PPAF form). Click the **OK** button. OK
63.	**End of Procedure.**

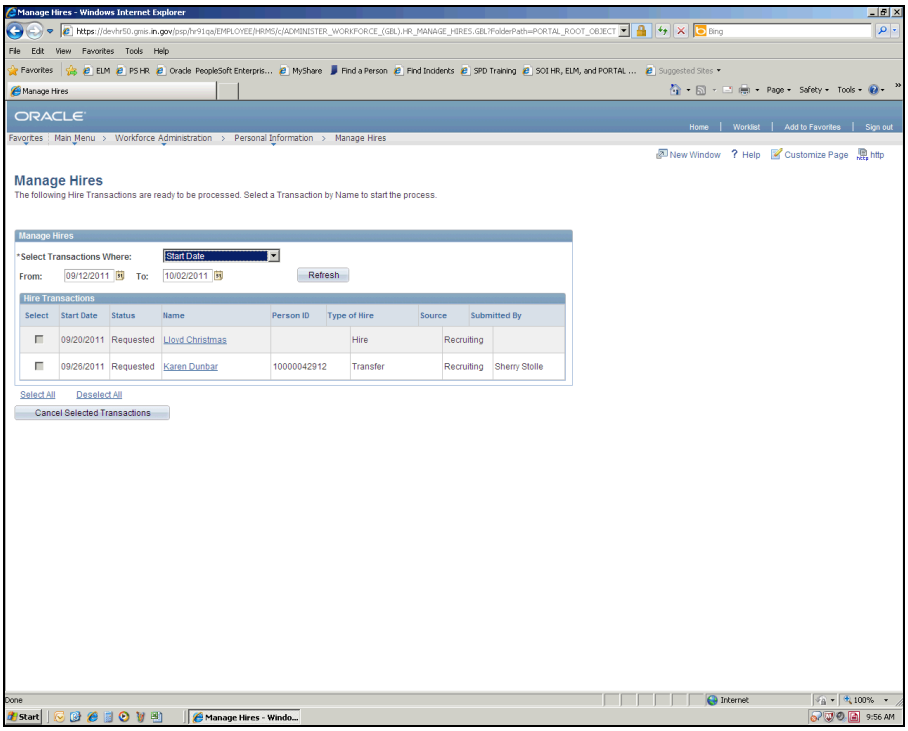
New Hire Processed in Manage Hires

Procedure

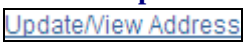


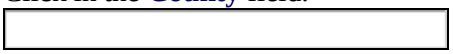
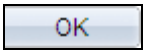
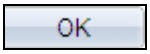
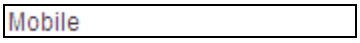
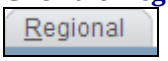
Step	Action
1.	Click the **Main Menu** button. Main Menu

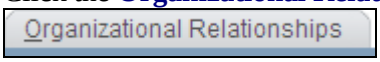
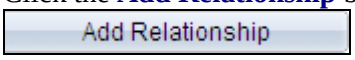
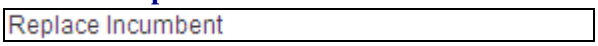
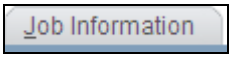
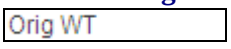
Step	Action
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Click the **Manage Hires** link. Manage Hires

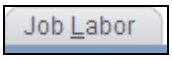
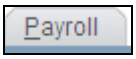
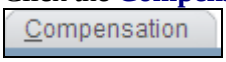
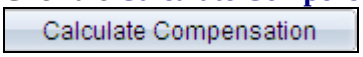
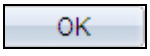


Step	Action
5.	The **From** and **To** fields can be adjusted to reflect the desired date range to search for candidates to hire. The date should reflect the **Prepared for Hire** date used by the recruiter. Sometimes, however, the system may pull the candidate's application date instead. If the candidate does not appear on the list, expand the date range. Click the **Name** link. Lloyd Christmas
6.	The **Type of Hire** field should automatically default to **Hire.** The **Desired Start Date** field should reflect the effective date of hire. The **effective date of hire** is always the new employee's first date of employment. Click the scrollbar.
7.	Click the **Add Person** button. Add Person

Step	Action
8.	Confirm the **Effective Date** field indicates the correct effective date of hire. Confirm that the name is spelled correctly. The employee's name in PeopleSoft must match the name as it appears on their Social Security card. Click the **Edit Name** button to make corrections to the name. Verify that the employee's birthdate is correct. If it is incorrect or if the employee did not provide their birthdate as an applicant, enter their correct **Date of Birth**. Enter the desired information into the **Date of Birth** field. Enter "**01/01/1976**".
9.	Verify the employee's gender is correct. If necessary, enter the correct data into the **Gender** field. While **Unknown** is an option in the list of values, an employee's gender **must** be specified as either **Male** or **Female**. Click the **Gender** list.
10.	Click the **Male** list item.
11.	Before leaving the **Biographical Details** tab, verify the **National ID** (for employees, this will be their Social Security number) is correct. Click the **Contact Information** tab.
12.	Click the **Add Address Detail** link.
13.	Click the **Update/View Address** link. 
14.	When making corrections to the employee's address, use the correct postal abbreviations. Do not use punctuation (ex: periods after abbreviations). Click in the **Address 1** field.
15.	In this example, we are changing the address to use the postal abbreviation for 'street'. To view a list of address abbreviations, go to **https://www.usps.com/ship/official-abbreviations.htm** Enter the desired information into the **Address 1** field. Enter "**St**".
16.	In this example, we are making a correction to the **City**. Click in the **City** field.
17.	Enter the desired information into the **City** field. Enter "**I**".

Step	Action
18.	Always confirm/enter the employee's county. Click in the **County** field. 
19.	Enter the desired information into the **County** field. Enter "**Marion**".
20.	Click the **OK** button. 
21.	Click the **OK** button. 
22.	To make corrections to telephone information already entered, click directly into the field and make the change. To add additional phone numbers, you will need to add a new row. Click the **Add a new row** button.
23.	Click the **Phone Type** list.
24.	Click the **Mobile** list item. 
25.	Click in the **Telephone** field.
26.	Enter the desired information into the **Telephone** field. Enter "**317/554-6528**".
27.	Click the **Preferred** option.
28.	To make corrections to an email address that has already been entered, click directly into the field and make the change. To add additional email addresses, you will need to add a new row. State Personnel will be utilizing home and business email addresses to contact employees in the future regarding important events (i.e. Open Enrollment). Please be sure to collect an email address from as many employees as possible. Click the **Add a new row** button.
29.	Click the **Business** list item.
30.	Enter the desired information into the **Email Address** field. Enter "**lchristmas@spd.in.gov**".
31.	Click the **Preferred** option.
32.	Click the **Regional** tab. 

Step	Action
33.	An employee's ethnic group is **REQUIRED.** If the ethnic group is not noted by the employee or the employee refuses to give this information, use a visual observation to make the best selection. If the **Ethnic Group** field is left as **Unknown,** EEO/AA reporting will be inaccurate. Click the **Look up Ethnic Group** button.
34.	Click the **HISPA** link.
35.	Click the **Organizational Relationships** tab. 
36.	Click the **Employee** option.
37.	Click the **Add Relationship** button. 
38.	The **Empl ID** number is now available. Confirm that the **Effective Date** field reflects the **Effective Date of Hire**. Click in the **Effective Date** field.
39.	The **Action** field will default to **Hire**. Click the **Reason** list.
40.	Click the **Replace Incumbent** list item. 
41.	Click the **Job Information** tab. 
42.	Click the **Empl Class** list.
43.	Select the designated status of the employee. The most common new hire statuses are: **Orig WT**: Agencies with classified employees use this status to activate the six-month working test probation period. **Quasi**: Quasi agencies. **Appointed**: Appointed positions. Click the **Orig WT** list item. 

Step	Action
44.	Click the **Job Labor** tab. 
45.	The **Union Seniority Date** field indicates the employee's seniority date only. This field does not indicate membership in a union. This should be the employee's date of hire. Enter the desired information into the **Union Seniority Date** field. Enter "**09/20/2011**".
46.	Click the **Payroll** tab. 
47.	Verify that the correct pay group defaults into the employee's record (example: **PYA** is Pay Group A and **PYB** is Pay Group B). Click the **Compensation** tab. 
48.	If the employee's starting salary is above the minimum of the hiring range, enter the adjusted compensation rate into the **Comp Rate** field. Click the **Calculate Compensation** button. 
49.	Click the **Employment Data** link.
50.	Confirm the **Company Seniority Date** and the **Benefits Service Date** fields are accurate. An inaccurate **Benefits Service Date** may impact the availability of employee benefits. Enter the employee's probation date into the **Probation Date** field. (The probation date is six months from the date of hire) An inaccurate probation date may impact the availability of employee benefits. Enter the desired information into the **Probation Date** field. Enter "**03/30/2012**".
51.	Click the **Benefits Program Participation** link.
52.	Select the correct **BAS Group ID**. BAS is the Benefits Administration Selection schedule for the agency. Click the **Look up BAS Group ID** button.
53.	Click the **RG1** link.
54.	Confirm that the **Effective Date** is correct and write the **Empl ID** number from the top of the screen on the Personnel Payroll Action Form (PPAF form). Click the **OK** button. 

Step	Action
55.	**End of Procedure.**

Entering Employee Actions

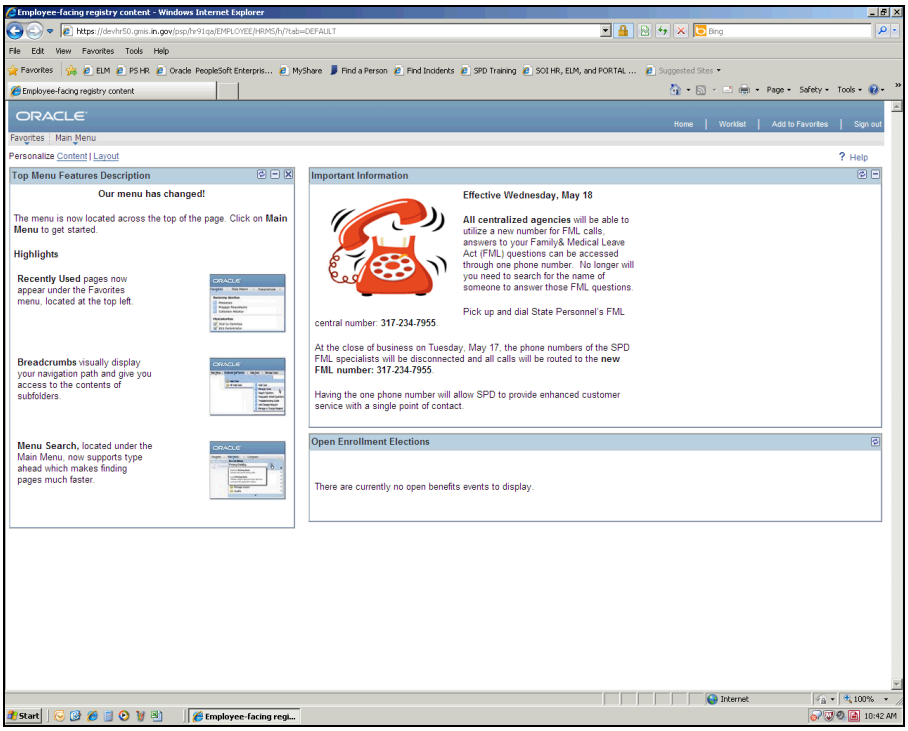
Employment actions affecting an employee's job data are recorded in the Workforce Administration **Job Data** record.

Generally, the HR Data Entry Personnel will be notified of an employment action through the submission of a *Personnel / Payroll Action Form (PPAF)*. Quasi agencies may or may not record employment actions on a PPAF.

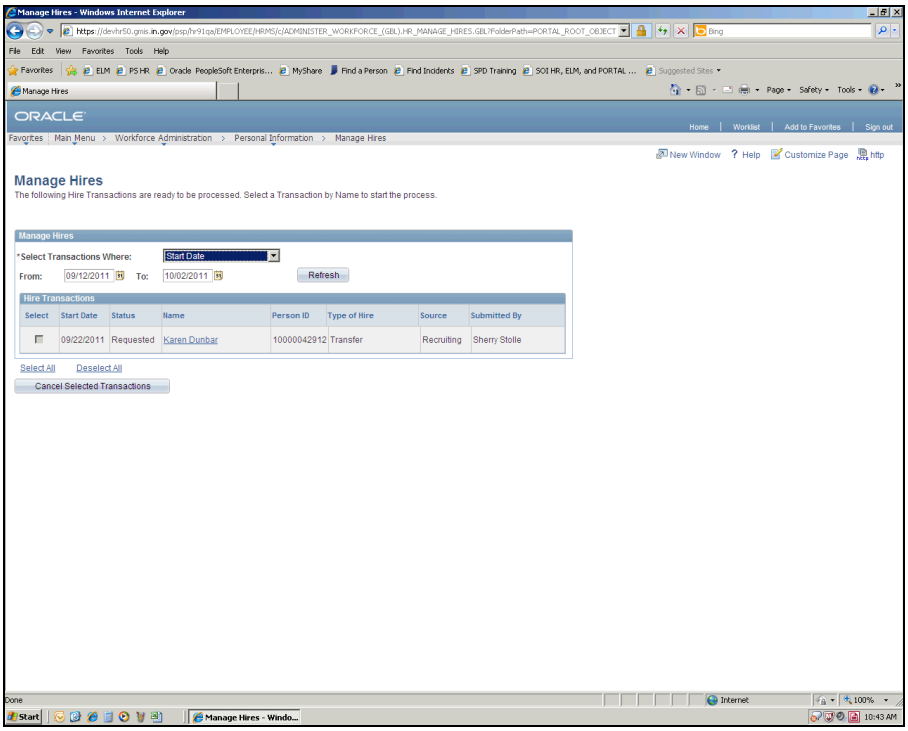
Employment actions include:
1. Transfers
2. Promotions
3. Demotions
4. Pay Rate Changes
5. Permanent Status Changes (classified agencies only)
6. Suspensions
7. Terminations

Transfer in Manage Hires

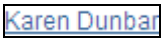
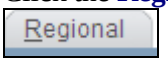
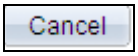
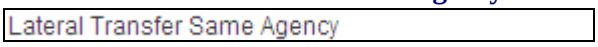
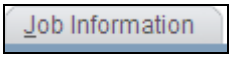
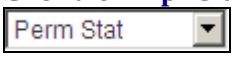
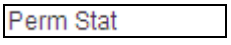
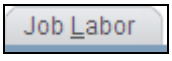
Procedure

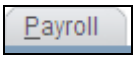
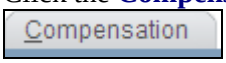
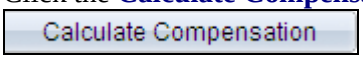
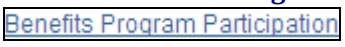
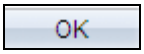


Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Click the **Manage Hires** link. Manage Hires



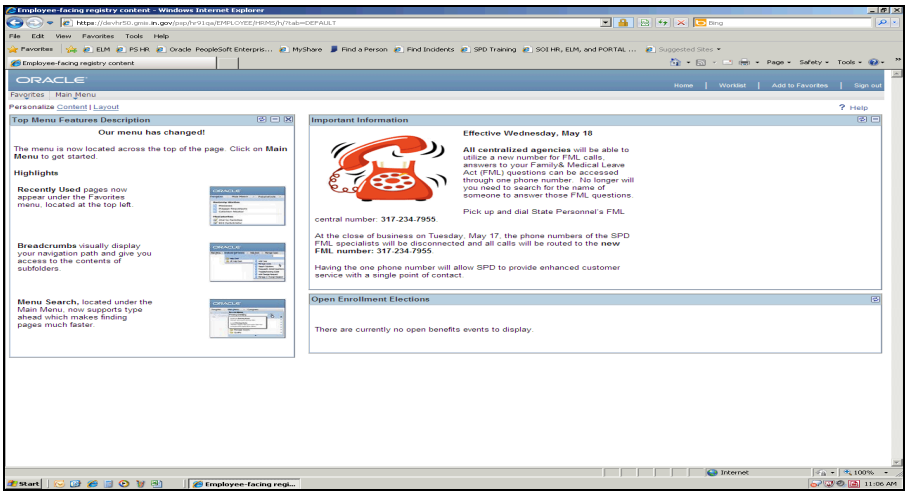
Step	Action
5.	Adjust the **From** and **To** fields to reflect the desired time frame. Click in the **From** field. 09/12/2011
6.	In this example, we will change the year to 2010. Enter the desired information into the **From** field. Enter "**10**".
7.	Click the **Refresh** button. Refresh
8.	Clicking the column heading will sort the names in alphabetical order. Click the **Name** column header. Name

Step	Action
9.	Locate the name in the list. Click the scrollbar.
10.	Click the **Name** link. 
11.	Click the scrollbar.
12.	Click the **View / Edit Person** link.
13.	If the employee is transferring positions within the same agency, add rows only if the personal data has changed. Click the **Contact Information** tab.
14.	Add rows to update the employee's address, telephone and email addresses if necessary. Click the **Regional** tab. 
15.	Confirm that the **Ethnic Group** field is entered correctly. Click the **Ethnic Group** look up button to change this value if necessary. In this example, no information was changed. Click the **Cancel** button. 
16.	Click the **Add Job** button.
17.	The **Action** field is automatically populated. Click the **Reason** list.
18.	Click the **Lateral Transfer Same Agency** list item. 
19.	Click the **Job Information** tab. 
20.	Click the **Empl Class** list. 
21.	Click the **Perm Stat** list item. 
22.	Click the **Job Labor** tab. 

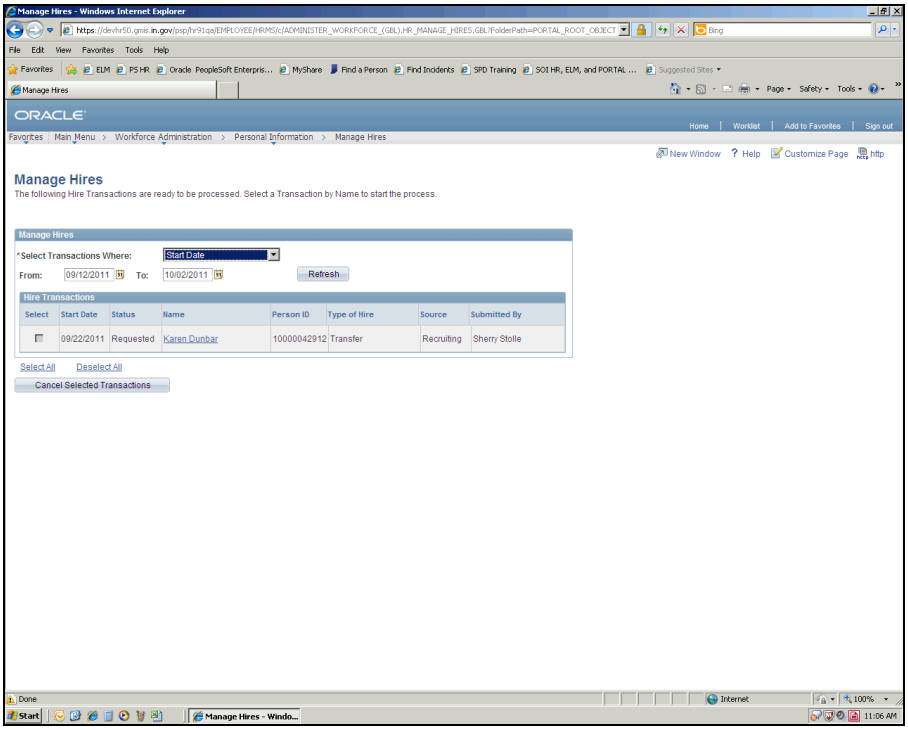
Step	Action
23.	Review the **Union Seniority Date** field to ensure that the field reflects the employee's original date of hire/rehire. Click the **Payroll** tab. 
24.	Verify that the **Pay Group** field populated correctly. Click the **Compensation** tab. 
25.	Adjust the biweekly compensation rate if necessary. Click the **Calculate Compensation** button. 
26.	Click the **Employment Data** link.
27.	If necessary, enter the new **Probation Date**. Click the **Benefits Program Participation** link. 
28.	If necessary, change the **BAS Group ID**. Click the **OK** button. 
29.	**End of Procedure.**

Promotion in Manage Hires

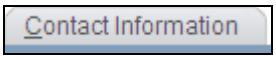
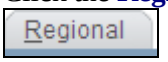
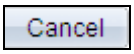
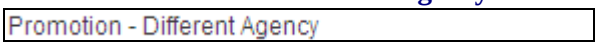
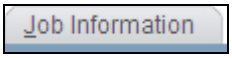
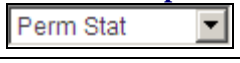
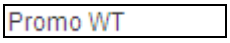
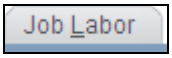
Procedure

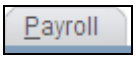
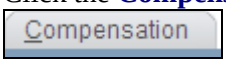
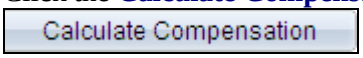
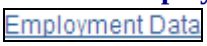


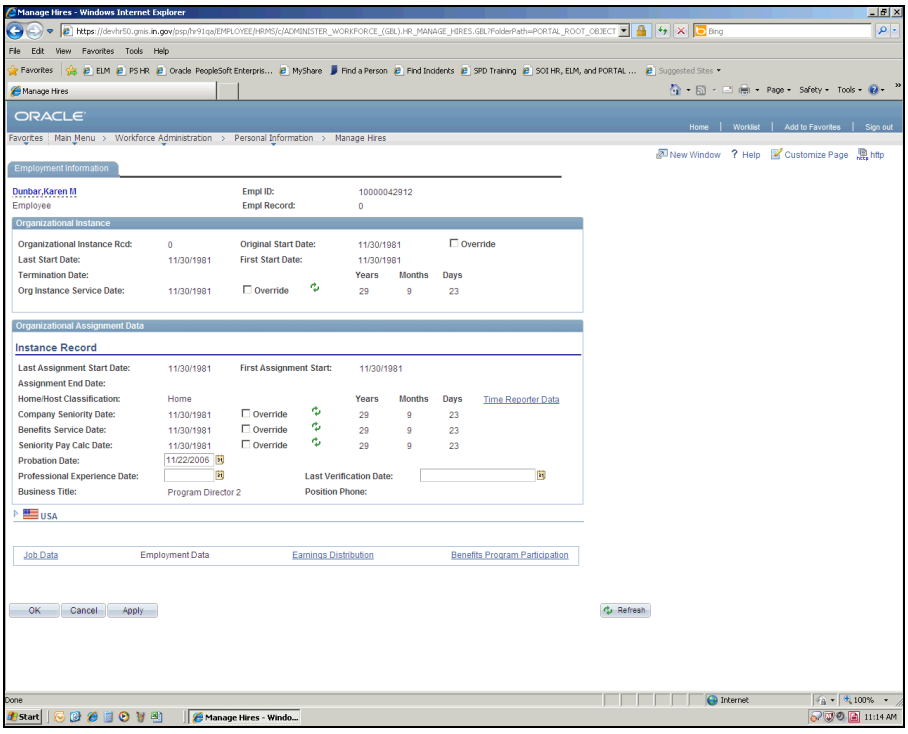
Step	Action
1.	Click the **Main Menu** link. Main Menu
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Click the **Manage Hires** link. Manage Hires



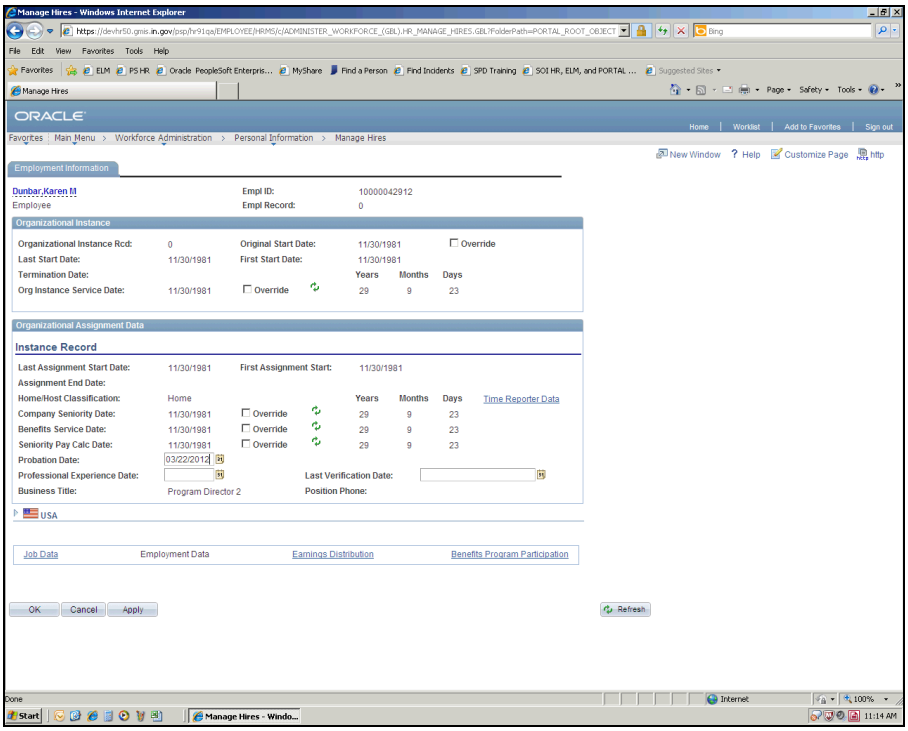
Step	Action
5.	Adjust the **From** and **To** fields to reflect the desired time frame. Enter the desired information into the **From** field. Enter "**05/12/2011**".
6.	Click the **Refresh** button. Refresh
7.	Clicking the column heading will sort the names in alphabetical order. Click the **Name** column header. Name
8.	Locate the name in the list. Click the scrollbar.

Step	Action
9.	Click the **Name** link.
10.	If the employee is changing agencies, the **Type of Hire** field shows the value of **Transfer**. Click the scrollbar.
11.	Click the **View / Edit Person** link.
12.	If the employee is being promoted to a new position within the same agency, add rows only if the personal data has changed. Add a row to update the **Effective Date** of the promotion as appropriate. Click the **Contact Information** tab. 
13.	Add rows to update the employee's address, telephone and email addresses if necessary. Click the **Regional** tab. 
14.	Confirm that the **Ethnic Group** field is entered correctly. Click the **Ethnic Group** look up button to change this value if necessary. In this example, no information was changed. Click the **Cancel** button. 
15.	Click the **Add Job** button.
16.	The **Action** field will automatically populate to **Transfer**. Click the **Reason** list.
17.	Click the **Promotion - Different Agency** list item. 
18.	Click the **Job Information** tab. 
19.	Click the **Empl Class** list. 
20.	Click the **Promo WT** list item. 
21.	Click the **Job Labor** tab. 

Step	Action
22.	Review the **Union Seniority Date** field to ensure that the field reflects the employee's original date of hire/rehire. Click the **Payroll** tab. 
23.	Verify that the **Pay Group** field populated correctly. Click the **Compensation** tab. 
24.	Adjust the biweekly compensation rate if necessary. Enter the desired information into the **Comp Rate** field. Enter "**1800**".
25.	Click the **Calculate Compensation** button. 
26.	Click the **Employment Data** link. 



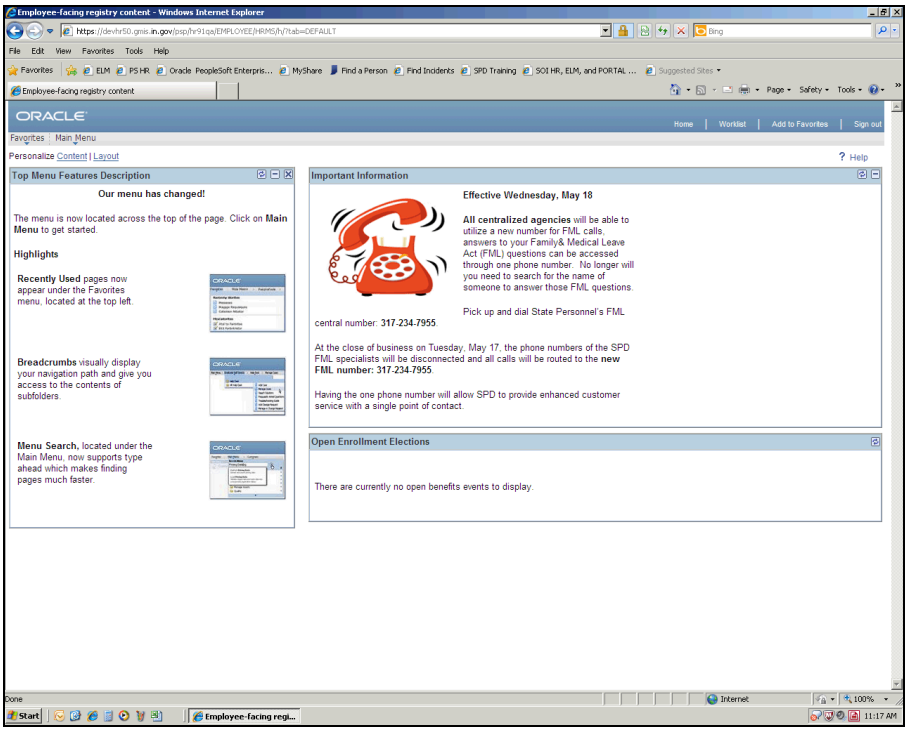
Step	Action
27.	If necessary, enter the new **Probation Date**. Enter the desired information into the **Catalog Item Abstract** field. Enter "**03/22/2012**".

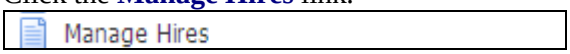


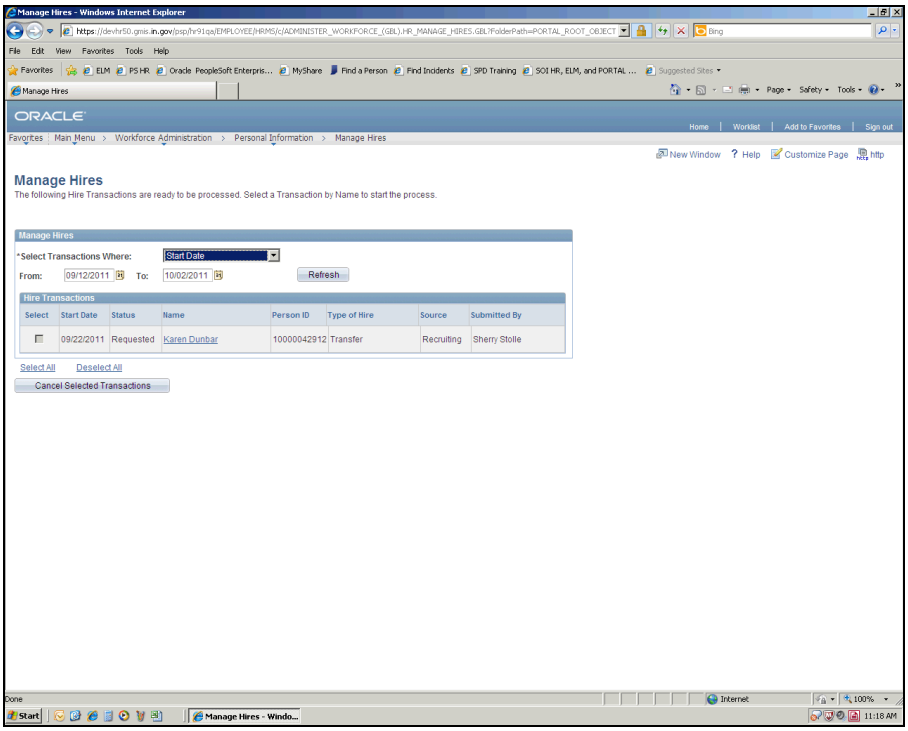
Step	Action
28.	Click the **Benefits Program Participation** link. Benefits Program Participation
29.	If necessary, update the **BAS Group ID**. Click the **Look up BAS Group ID** button.
30.	Click the **RG1** link. RG1
31.	**PROOF & VERIFY the information entered into the employee record!!!** Once a record is saved, the record is there until the State Personnel Department's Data Entry corrects the record. Inaccurate or missing information may impact employee benefits and *could even possibly terminate them*. Click the **OK** button. OK
32.	**End of Procedure.**

Demotion in Manage Hires

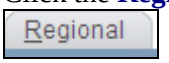
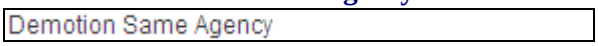
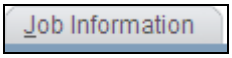
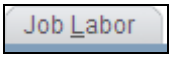
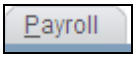
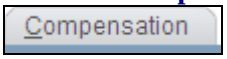
Procedure

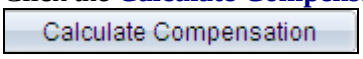
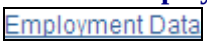
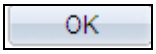


Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Click the **Manage Hires** link. 



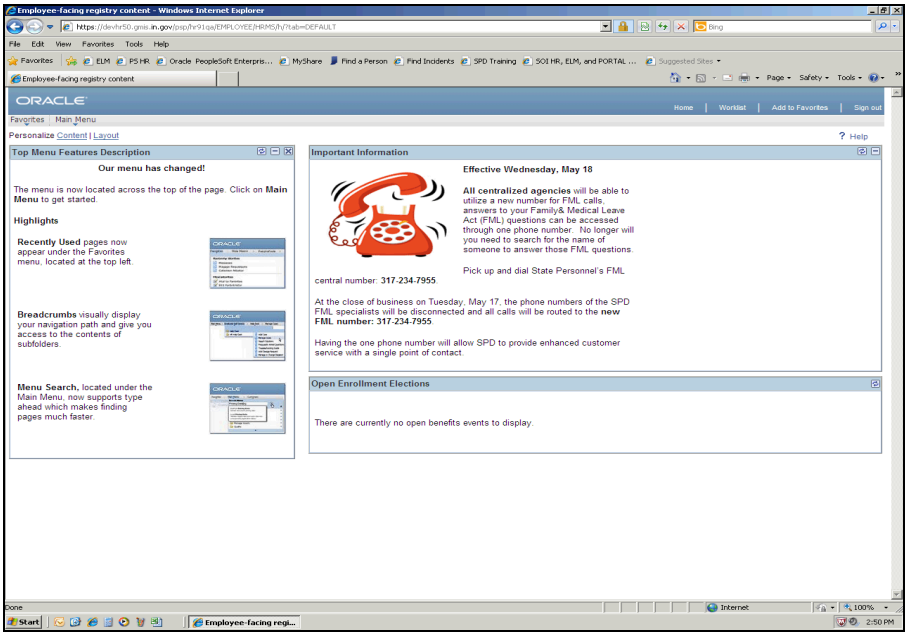
Step	Action
5.	Adjust the From and To fields to reflect the desired time frame. Enter the desired information into the **From** field. Enter "**05/22/2011**".
6.	Click the **Refresh** button. Refresh
7.	Clicking the column heading will sort the names in alphabetical order. Click the **Name** column header. Name
8.	Locate the name in the list. Click the scrollbar.
9.	Click the **Name** link. Karen Dunbar
10.	Click the scrollbar.
11.	Click the **View / Edit Person** link. View / Edit Person

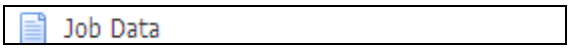
Step	Action
12.	If the employee is being demoted to a position within the same agency, add rows only if the personal data has changed. If the employee is being demoted to a position from a different agency - with a different benefit plan (**example**: DOC to ISP) add a row to each area of personal data and enter the **Effective Date** of the transfer. Click the **Contact Information** tab.
13.	Add rows to update the employee's address, telephone and email addresses if necessary. Click the **Regional** tab. 
14.	Confirm that the **Ethnic Group** field is entered correctly. Click the **Ethnic Group** look up button to change this value if necessary. In this example, no information was changed. Click the **Cancel** button.
15.	Click the **Add Job** button.
16.	The **Action** field will automatically populate to **Transfer**. Click the **Reason** list.
17.	Click the **Demotion Same Agency** list item. 
18.	Click the **Job Information** tab. 
19.	Review the information on this screen for accuracy. Click the **Job Labor** tab. 
20.	Review the **Union Seniority Date** field to ensure that the field reflects the employee's original date of hire/rehire. Click the **Payroll** tab. 
21.	Verify that the **Pay Group** field populated correctly. Click the **Compensation** tab. 

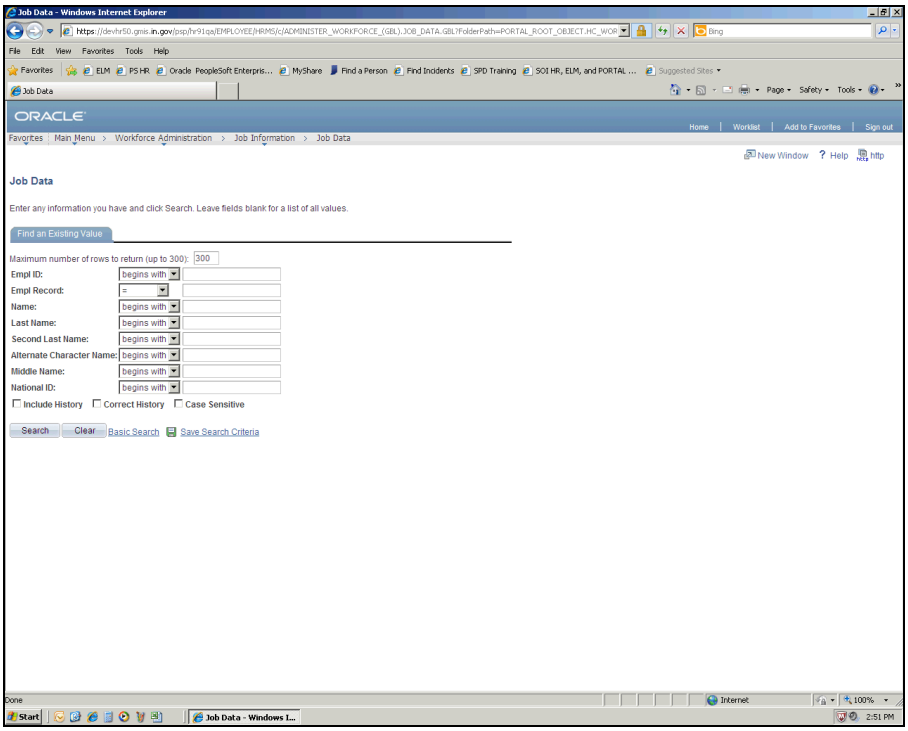
Step	Action
22.	Adjust the biweekly compensation rate if necessary. Click the **Calculate Compensation** button. 
23.	Click the **Employment Data** link. 
24.	Change the **Probation Date** if necessary. Click the **Benefits Program Participation** link.
25.	If necessary, update the **BAS Group ID**. Click the **Look up BAS Group ID** button.
26.	Click the **RG1** link.
27.	Click the **OK** button. 
28.	**End of Procedure.**

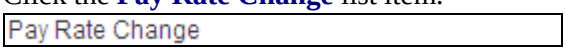
Entering a Pay Rate Change

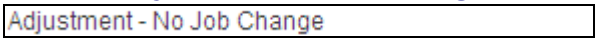
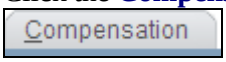
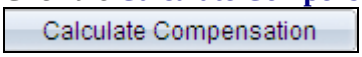
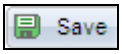
Procedure



Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** link. 

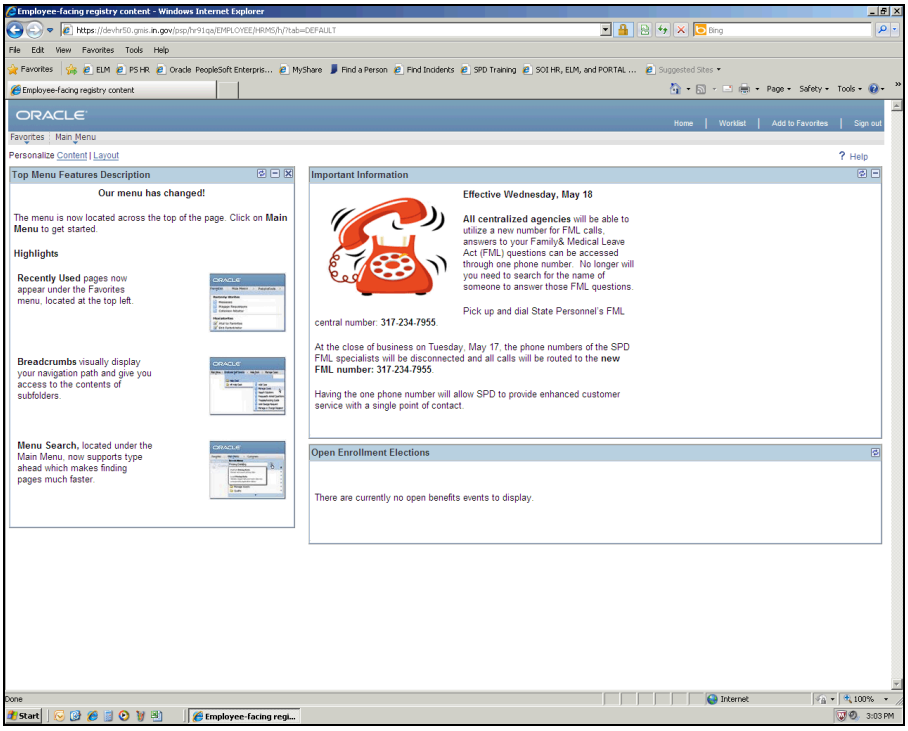


Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
6.	Click the **Search** button.
7.	Click the **Add a new row** button.
8.	Update the **Effective Date** field if necessary. Click the **Action** list.
9.	Click the **Pay Rate Change** list item. 
10.	Click the **Reason** list.

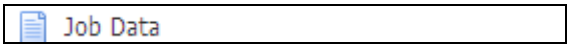
Step	Action
11.	Select the appropriate **Reason**. Click the **Adjustment - No Job Change** list item. 
12.	Click the **Compensation** tab. 
13.	Enter the desired information into the **Comp Rate** field. Enter "**1301**".
14.	Click the **Calculate Compensation** button. 
15.	Click the **Save** button. 
16.	**End of Procedure.**

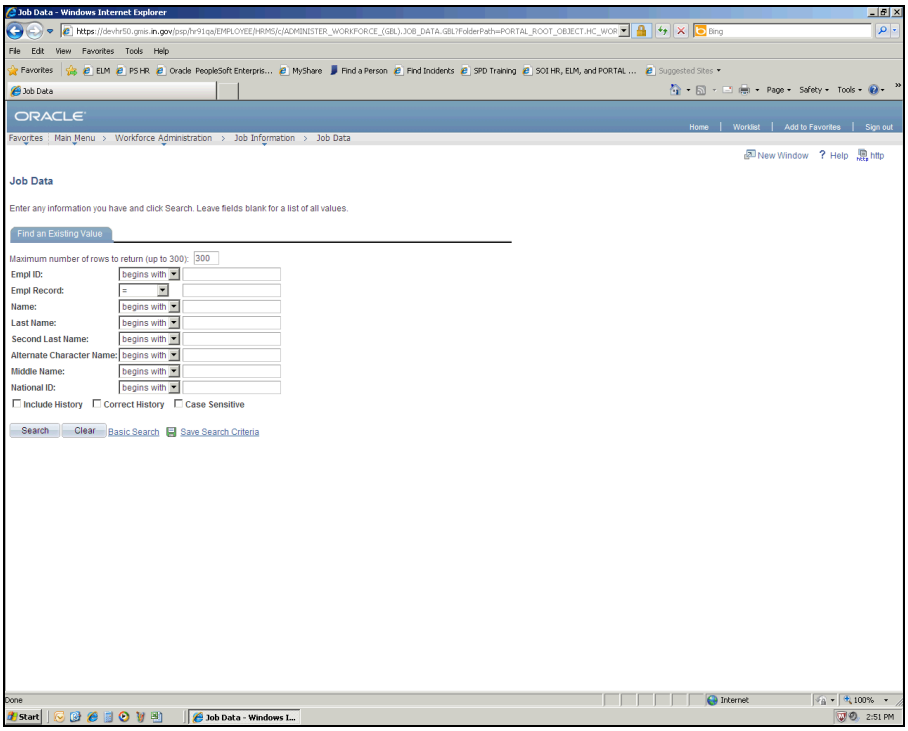
Entering Permanent Status

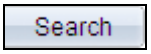
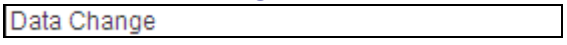
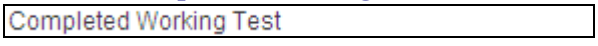
Procedure

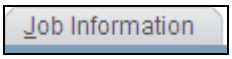
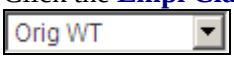
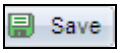


Step	Action
1.	Click the **Main Menu** link.

Step	Action
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** link. 

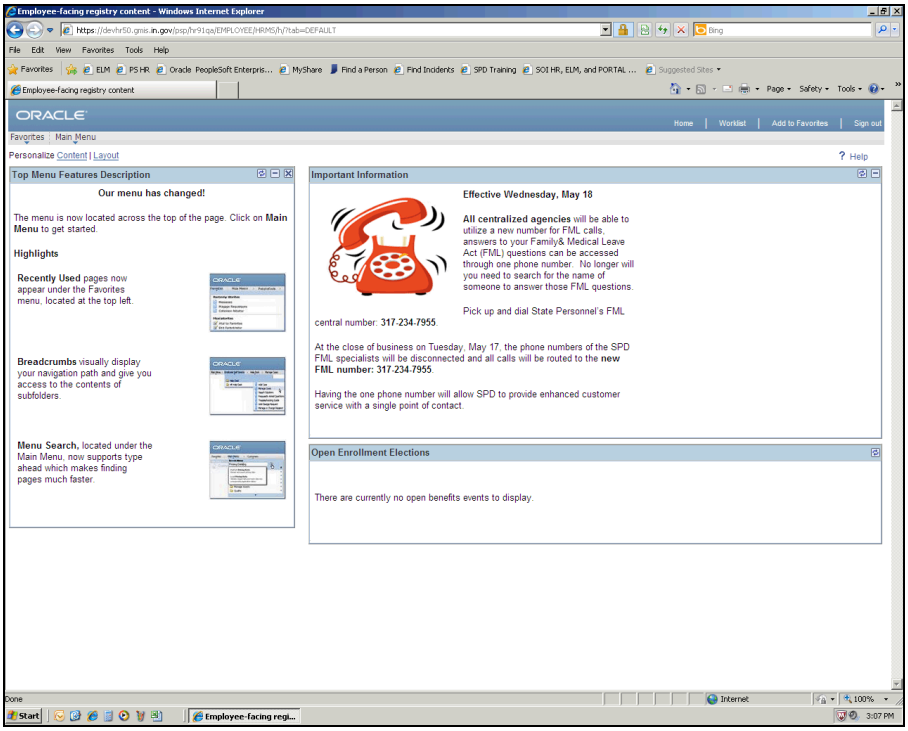


Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
6.	Click the **Search** button. 
7.	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
8.	Click the **Data Change** list item. 
9.	Click the **Reason** list.
10.	Select the appropriate **Reason** (**Completed Working Test**/**Extended Working Test**) from the drop-down list. Click the **Completed Working Test** list item. 

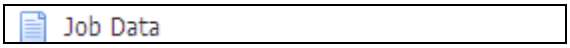
Step	Action
11.	Click the **Job Information** tab. 
12.	Click the **Empl Class** list. 
13.	Select the appropriate employee class (**Perm Stat**, **XOrig WT** or **XPromo WT**) from the list of values. If extending the working test, be sure to change the probation date as appropriate. Click the **Perm Stat** list item.
14.	Click the **Save** button. 
15.	**End of Procedure.**

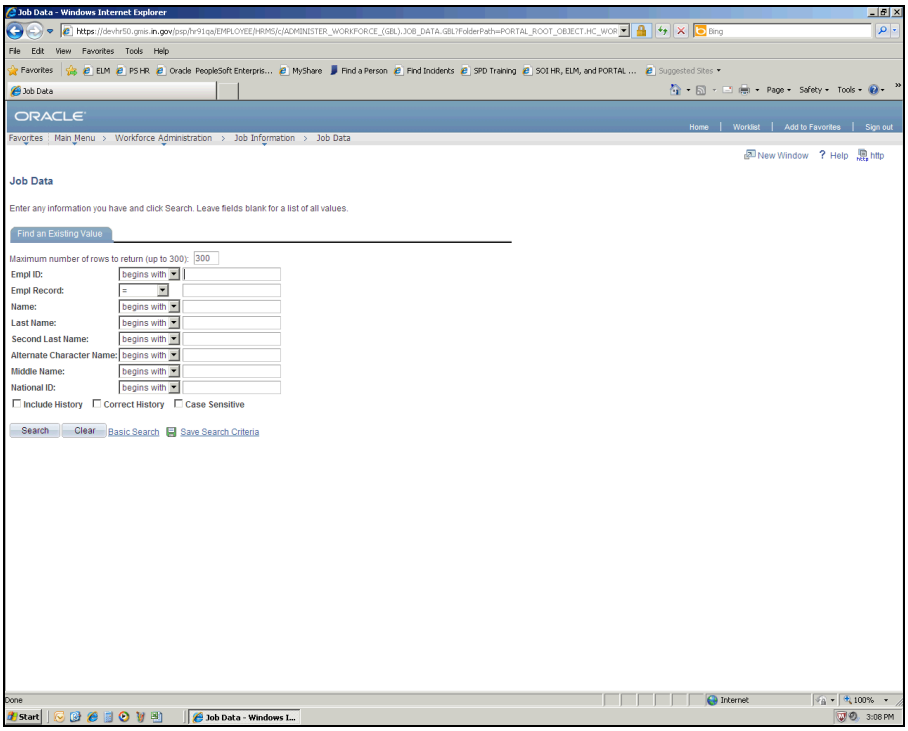
Entering a Suspension

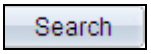
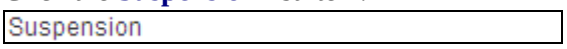
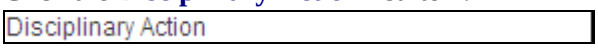
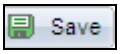
Procedure



Step	Action
1.	Click the **Main Menu** link.

Step	Action
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** link. 

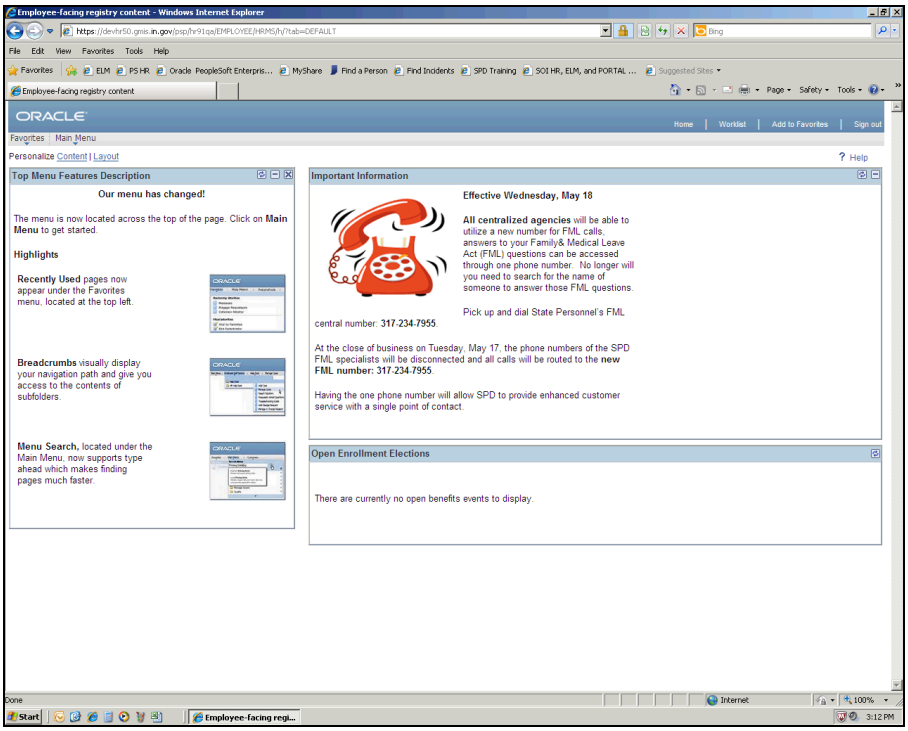


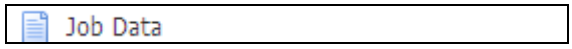
Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
6.	Click the **Search** button. 
7.	Change the **Effective Date** field if necessary. Click the **Add a new row** button.
8.	Click the **Action** list.
9.	Click the **Suspension** list item. 
10.	Click the **Disciplinary Action** list item. 
11.	Click the **Save** button. 

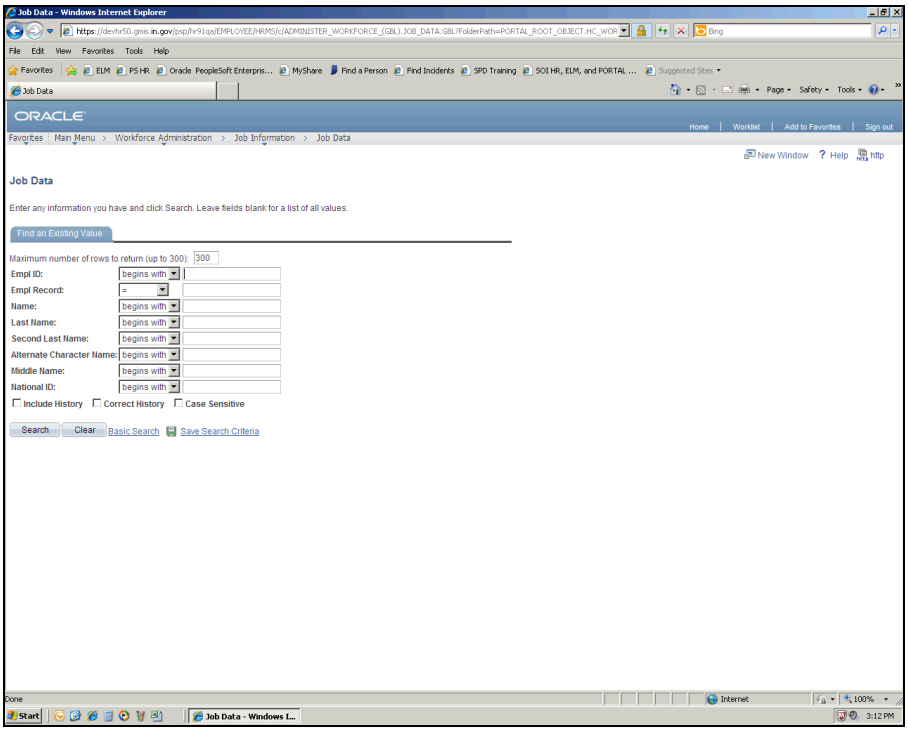
Step	Action
12.	**End of Procedure.**

Entering a Termination

Procedure



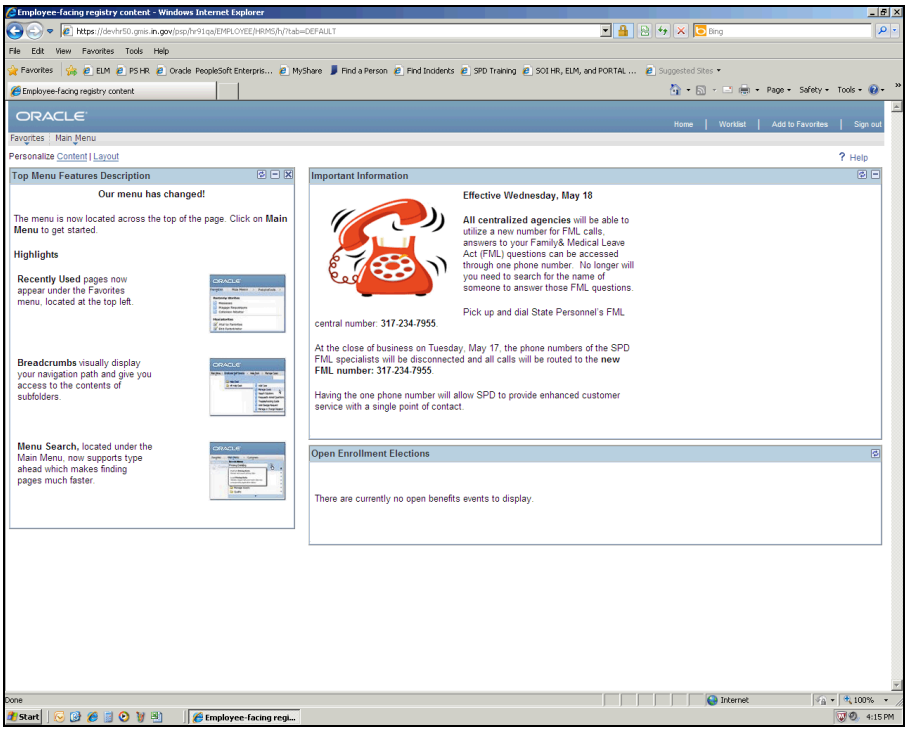
Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** link. 

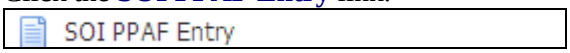


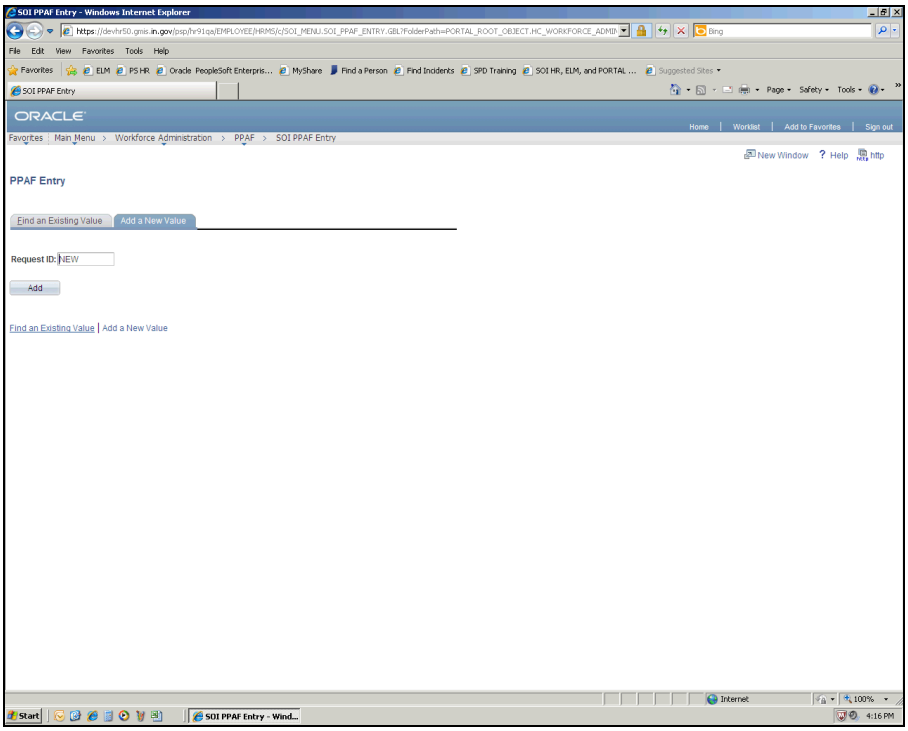
Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
6.	Click the **Search** button. Search
7.	Update the **Effective Date** field if necessary. Click the **Add a new row** button. +
8.	Click the **Action** list. Hire
9.	If the employee is retiring, use the **Retirement Action** and **Reason** (not **Termination**). Click the **Termination** list item. Termination
10.	Click the **Reason** list.
11.	Select the appropriate **Reason** from the list. Click the **Dismiss (NEFR)** list item. Dismiss (NEFR)
12.	Click the **Save** button. Save
13.	**End of Procedure.**

Request Electronic Personnel Action Form (PPAF)

Procedure



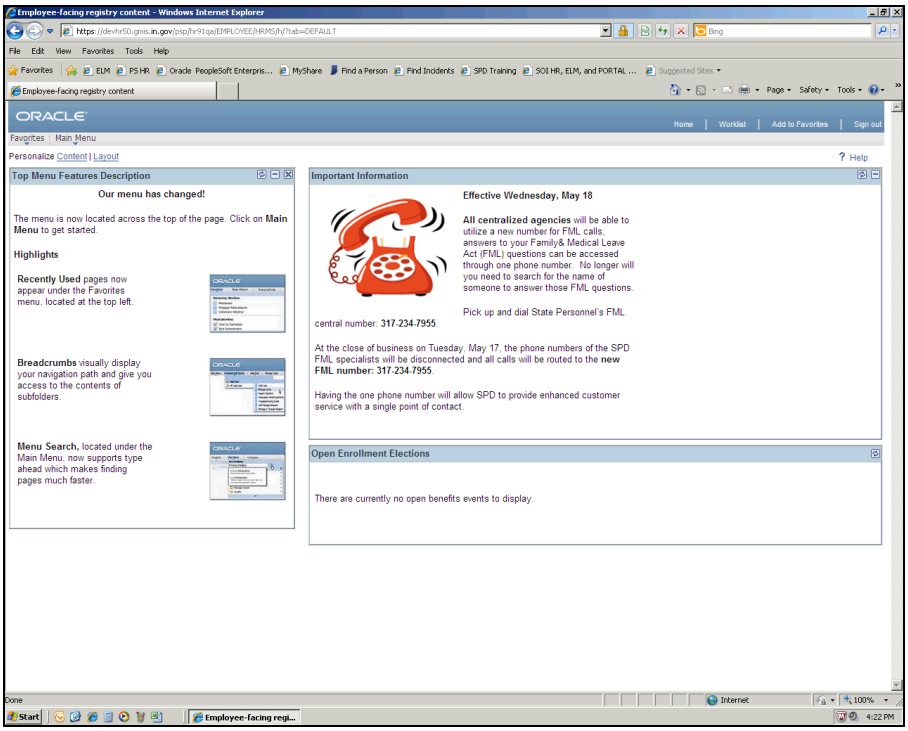
Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **PPAF** menu.
4.	Click the **SOI PPAF Entry** link. 



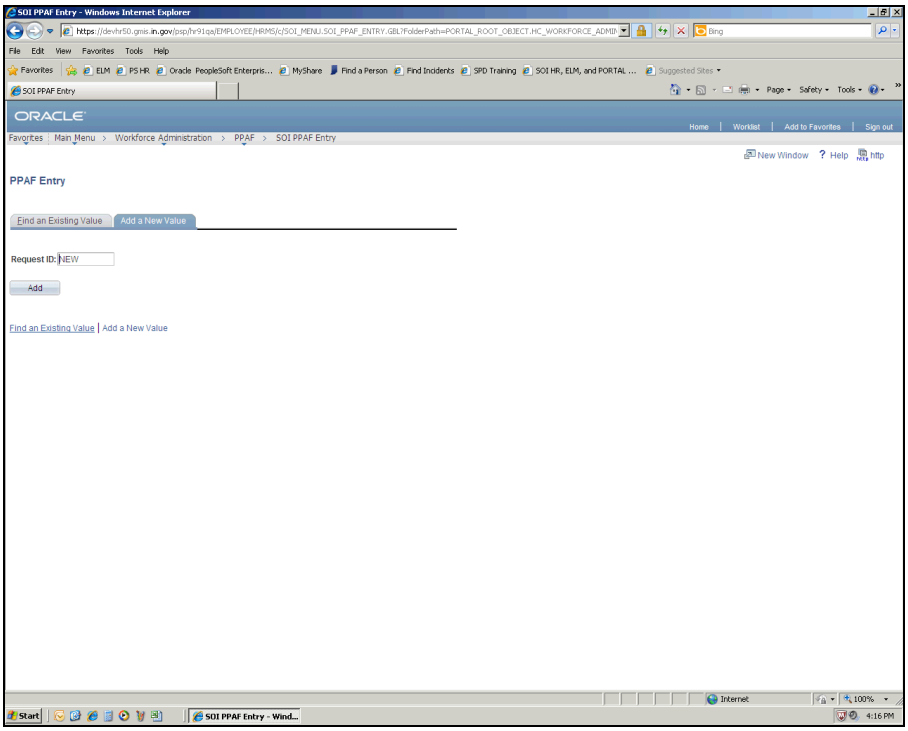
Step	Action
5.	Click the **Add** button. Add
6.	Enter the desired information into the **Employee ID** field. Enter "**10000280299**".
7.	Pressing the **Tab** key on your keyboard will cause all of the employee's information to populate. Press **[Tab]**.
8.	Enter the desired information into the **Effective Date** field. Enter "**09/23/2011**".
9.	Click the **Look up Action** button.
10.	Click the **Data Change** link. Data Change
11.	Click the **Look up Reason** button.
12.	Click the **Extended Working Test** link. Extended Working Test
13.	Click the **Submit** button. Submit
14.	**End of Procedure.**

Request Electronic Personnel Action Form (PPAF) - Pay Rate Change

Procedure



Step	Action
1.	Click the **Main Menu** link. Main Menu
2.	Point to the **Workforce Administration** menu.
3.	Point to the **PPAF** menu.
4.	Click the **SOI PPAF Entry** link. SOI PPAF Entry



Step	Action
5.	Click the **Add** button. Add
6.	Enter the desired information into the **Employee ID** field. Enter "**10000280299**".
7.	Clicking the **Tab** key on your keyboard will cause the employee's information to populate onto the screen. Press **[Tab]**.
8.	Enter the desired information into the **Effective Date** field. Enter "**09/26/2011**".
9.	Click the **Look up Action** button.
10.	Click the **Pay Rate Change** link. Pay Rate Change
11.	Click the **Look up Reason** button.
12.	Click the **Adjustment - No Job Change** link. Adjustment - No Job Change
13.	Enter the desired information into the **Rate** field. Enter "**1301**".
14.	Click the **Submit** button. Submit
15.	**End of Procedure.**

Family Status Changes

Family status changes occur when a major life event happens affecting an employee's benefits. Family status changes include:

- Acquiring Dependents
- Dependent Deaths
- Marriage
- Divorce
- Change in Employment resulting in Loss of Insurance Coverage
- Dropping of State Insurance Coverage

Family status changes **REQUIRE** formal documentation for the transactions to be entered into the employee's record. Changes are always entered into the employee's **Job Data** record but some changes may also require a change to the employee's **Biographical Information** record (such as name changes, marital status changes, etc).

Employee's have **30 DAYS FROM THE EVENT EFFECTIVE DATE** (the date the event occurred) to report and have recorded for benefits purposes. Family status change benefit events not reported within 30 days from the effective date **will require the employee to wait until the Open Enrollment period** to have the benefit changes entered into the system for the next calendar year.

The **Action** recorded in the **Job Data** record will always be the **Family Status Change** option; however the **Reason Code** for the family status change will vary depending on the **circumstances and effective dates** of the change. Using the *Family Status Changes* document located in the Supplemental Materials section of the Workforce Administration tutorial work instructions, will ensure that the correct **Reason Code** is used to record the family status change.

Effective Dating

The **Effective Date** indicates when an action or event is in effect or valid. Each employee record is effective dated. PeopleSoft is designed to automatically perform certain functions based on the Effective Date. Effective Dating provides a mechanism for determining if a transaction is current, history, or future.

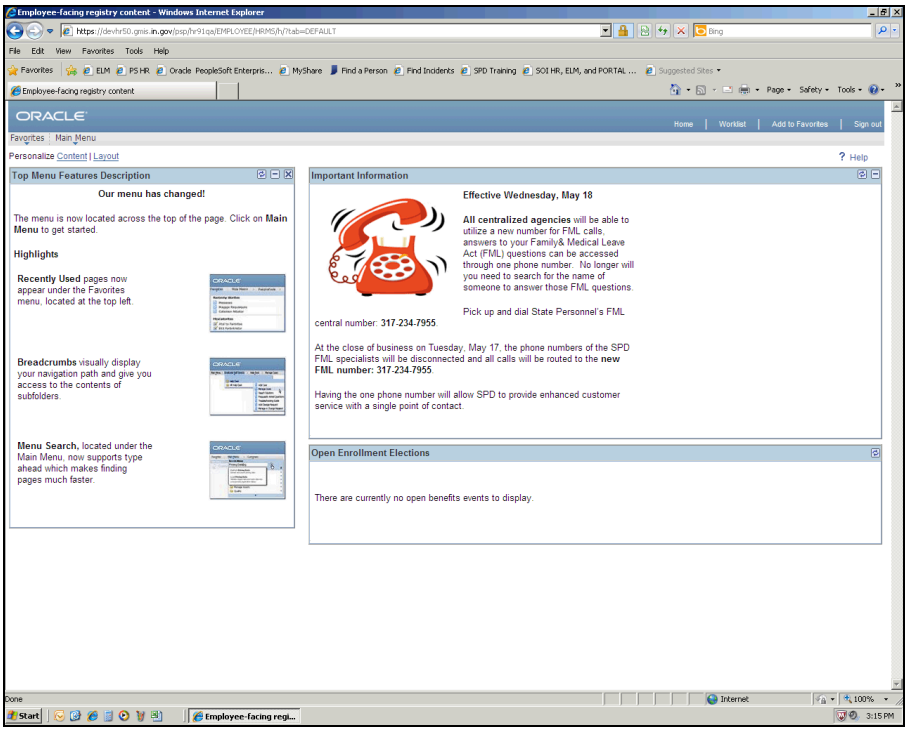
Some pages will display the word **Current, History, or Future** so you can always tell what type of transaction you are viewing. Every action taken on an employee will have an effective date. Because we have been in production for multiple fiscal years there may be more than one record associated with an employee. Future dated actions may be in the system but PeopleSoft does not act on that information until the actual day of the effective date.

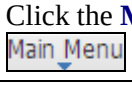
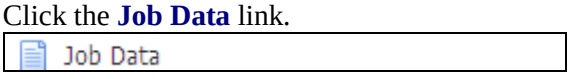
Current: Closest to but not exceeding today's date.
Future: Greater than today's date.
History: Prior to current date effective date.

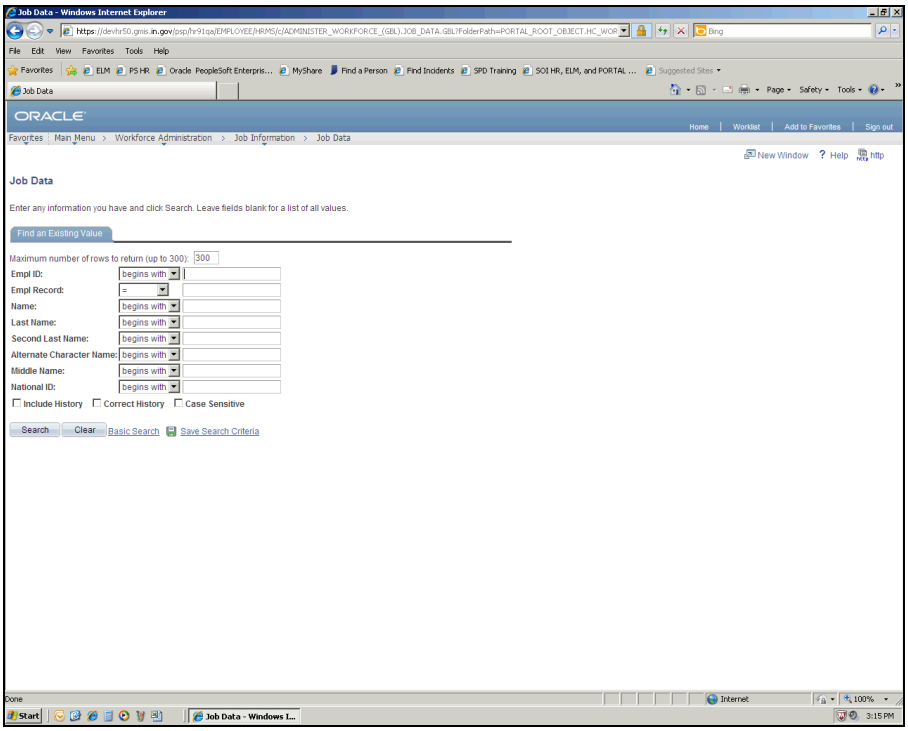
Note: It is very important to use the correct date for new hires, rehires, and terminations as these dates impact benefits and compensation.

Entering a Family Status Change

Procedure



Step	Action
1.	Click the **Main Menu** link. 
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** link. 



Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
6.	Click the **Search** button. Search
7.	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
8.	Click the **Action** list. Hire
9.	Click the **Family Status Change** list item. Family Status Change
10.	Click the **Emp Marriage Eff on Event Dt** list item. Emp Marriage Eff on Event Dt
11.	As a result of a marriage, divorce or death of a spouse, the employee's personal data may require modification. In this example, the employee has submitted a family status change due to marriage, which may require the user to update the employee's **last name** and **marital status**. See the *Updating Personal Information* procedure. Click the **Save** button. Save
12.	**End of Procedure.**

Leaves of Absence

Leaves of absence occur due to an employee's need to be off work for a circumstance covered under **Family Medical Leave**. In these instances, family medical leave hours are tracked concurrently with leave of absence.

If the leave is due to personal illness, there is a 30 day elimination (waiting) period before an employee's short-term disability benefits become available.

There are two types of a leave of absence: paid or unpaid. **Paid leave of absences** occur when the employee has benefit leave time that can be taken in the form of sick, vacation, or personal days. **Unpaid leave of absences** occur when the employee has no benefit leave available during the leave and/or until the 30 day elimination period is over to receive short-term disability benefits.

If an employee's leave of absence status changes from paid to unpaid, the employee must have a **Job Data** record entry to **return them from the paid leave of absence** prior to the **Job Data** record entry recording the **unpaid leave of absence** status.

Proper effective dating and sequencing is critical when recording changes in an employee's leave of absence status.

Effective Dating

The **Effective Date** indicates when an action or event is in effect or valid. Each employee record is effective dated. PeopleSoft is designed to automatically perform certain functions based on the Effective Date. Effective Dating provides a mechanism for determining if a transaction is current, history, or future.

Some pages will display the word **Current, History, or Future** so you can always tell what type of transaction you are viewing. Every action taken on an employee will have an effective date. Because we have been in production for multiple fiscal years there may be more than one record associated with an employee. Future dated actions may be in the system but PeopleSoft does not act on that information until the actual day of the effective date.

Current: Closest to but not exceeding today's date.
Future: Greater than today's date.
History: Prior to current date effective date.

Note: It is very important to use the correct date for new hires, rehires, and terminations as these dates impact benefits and compensation.

Multiple Actions

It is necessary to use **Effective Sequencing** when more than one action occurs on the same **Effective Date**.

Example 1:
STEP 1: When an employee acquires a new dependent, the first entry (sequence **0**) inserted into the **Action/Reason** fields indicate the action of **Paid Leave of Absence** with a reason of **(FML) Paid FMLA Use Accrued Time**.

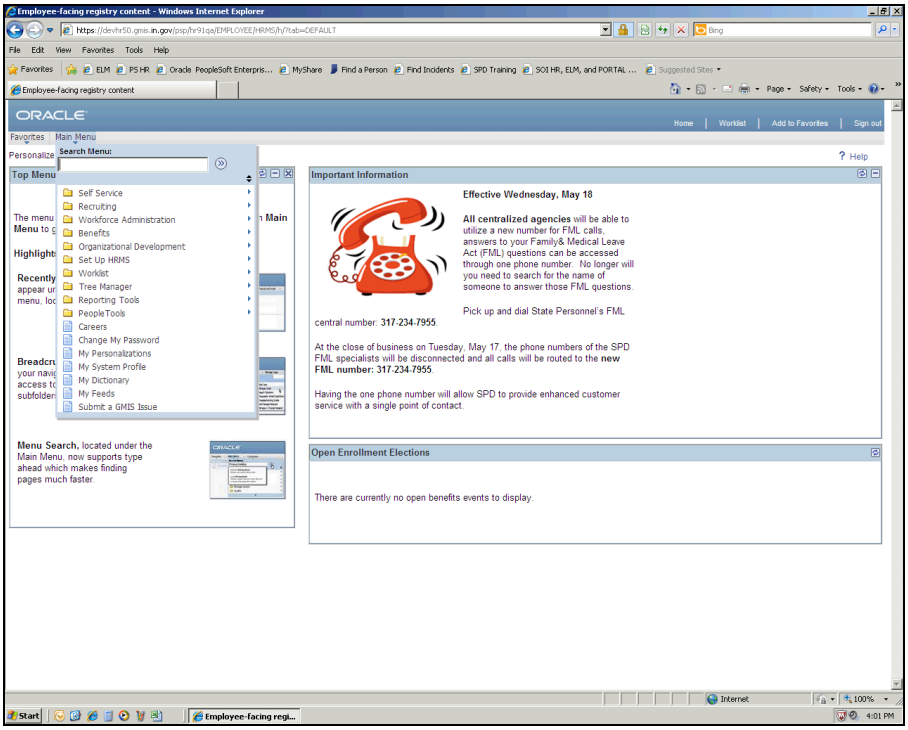
STEP 2: To enter a second event on the same effective date, click the **Add A Row** button to insert a new row. The second entry (sequence **1**) inserted into the **Action/Reason** fields indicate the action of **Family Status Change** with a reason of **(ACI) Acquire Dep Eff on Event Dt** .

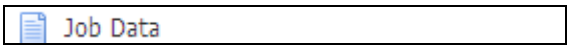
Example 2:
STEP 1: When an employee is promoted within their own agency, the first entry (sequence **0**) inserted into the **Action/Reason** fields indicate the action of **Promotion** with a reason of **(PSA) Promotion - Same Agency**.

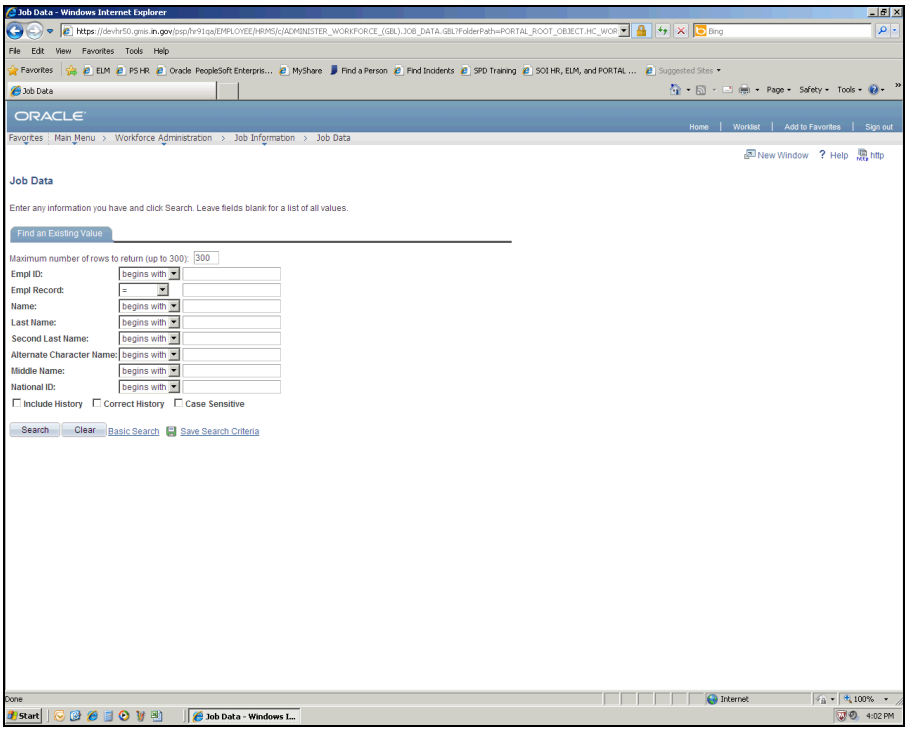
STEP 2: To enter a second event on the same effective date, click the **Add A Row** button to insert a new row. The second entry (sequence **1**) inserted into the **Action/Reason** fields indicate the action of **Pay Rate Change** with a reason of **(GSA) General Salary Adjustment**.

Entering a Unpaid Leave of Absence

Procedure



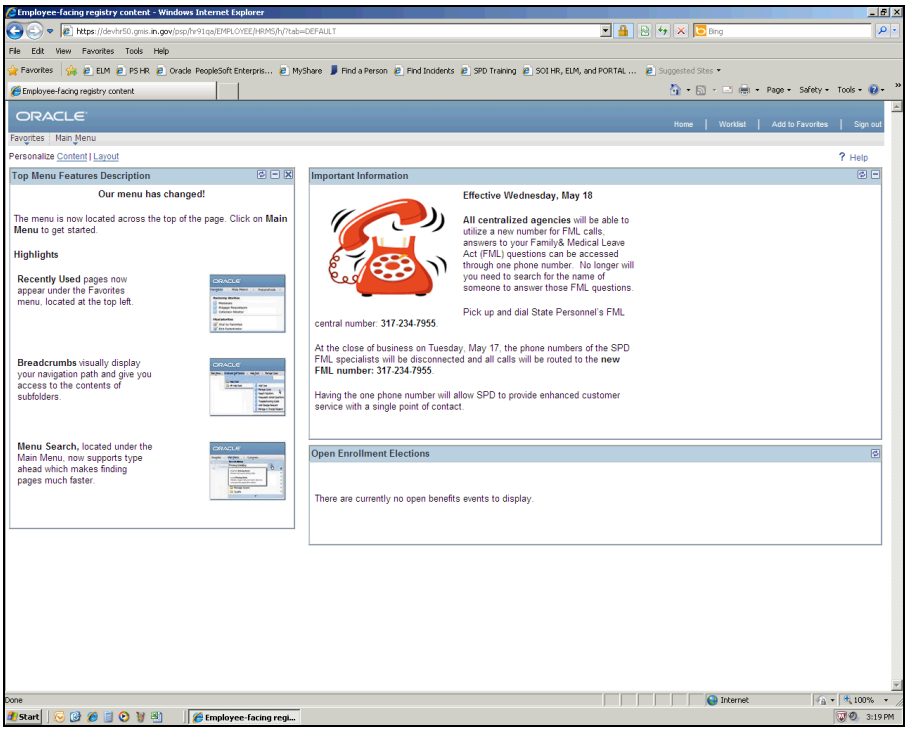
Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** link. 

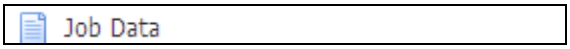


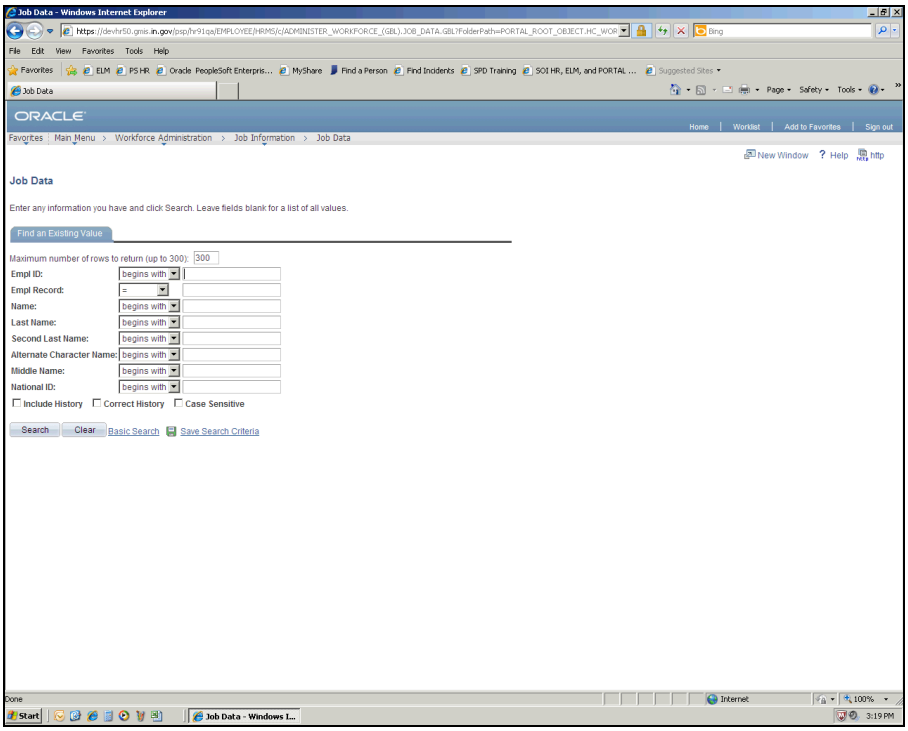
Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000272287**".
6.	Click the **Search** button. Search
7.	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
8.	Click the **Action** list. Data Change
9.	Click the **Leave of Absence** list item. Leave of Absence
10.	Click the **Reason** list.
11.	Select the appropriate **Reason**. Click the **Personal** list item. Personal
12.	Click the **Save** button. Save
13.	**End of Procedure.**

Entering a Paid Leave of Absence

Procedure



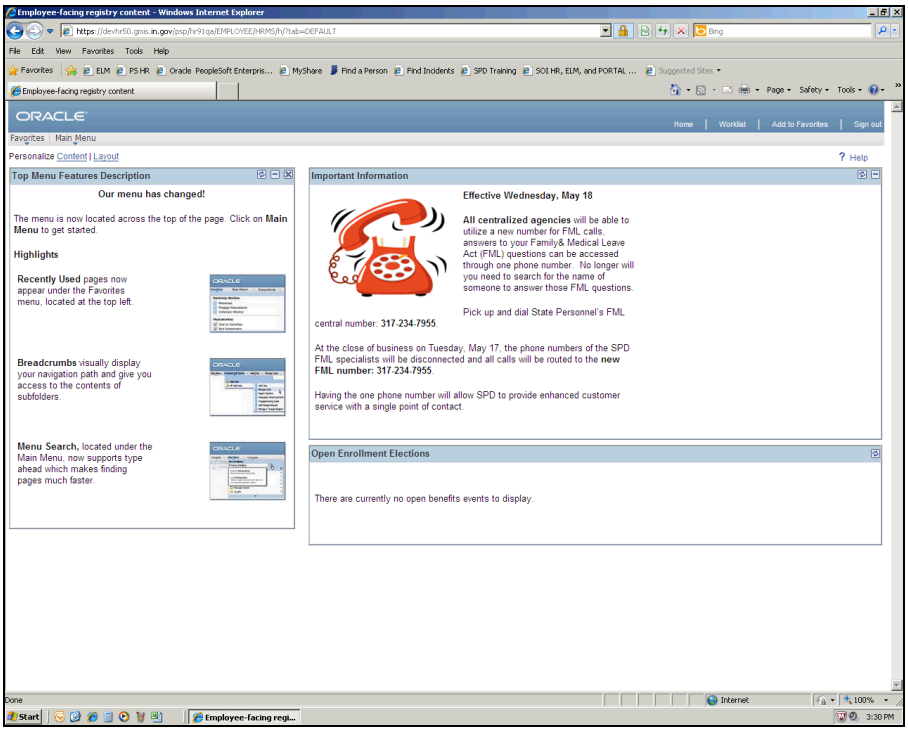
Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** link. 



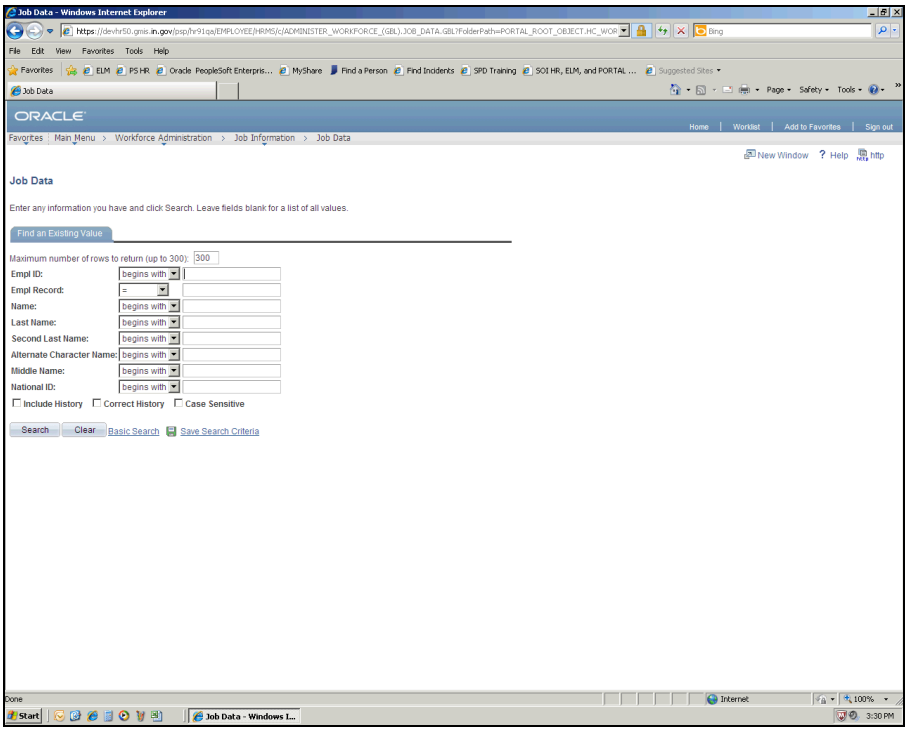
Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
6.	Click the **Search** button. Search
7.	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
8.	Click the **Action** list. Hire
9.	Click the **Paid Leave of Absence** list item. Paid Leave of Absence
10.	Click the **Reason** list.
11.	Select the appropriate **Reason**. Click the **Paid FMLA Use Accrued Time** list item. Paid FMLA Use Accrued Time
12.	Click the **Save** button. Save
13.	**End of Procedure.**

Entering a Return from Paid Leave

Procedure



Step	Action
1.	Click the **Main Menu** link. Main Menu
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** link. Job Data



Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
6.	Click the **Search** button. Search
7.	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
8.	Click the **Action** list. Paid Leave of Absence
9.	Click the **Return from Leave** list item. Return from Leave
10.	Click the **Reason** list.
11.	Select the appropriate **Reason**. Click the **Return from Paid Leave** list item. Return from Paid Leave
12.	Click the **Save** button. Save
13.	**End of Procedure.**

Disability

An eligible employee may receive short-term disability benefits for personal illness after completing a 30 day elimination (waiting) period.

To record an employee's short-term disability status in Workforce Administration, the employee must have a **Job Data** record entry to **return them from the paid leave of absence or unpaid leave of absence** status prior to the **Job Data** record entry recording the **short-term disability with pay** status. The short-term disability status is for a six month period (this includes the 30 day elimination period) and then an eligible employee would be moved to long-term disability status.

To record an employee's long-term disability status in Workforce Administration, the employee must have a **Job Data** record entry to **return them from the short-term disability with pay** status prior to the **Job Data** record entry recording the **long-term disability with pay** status.

Proper effective dating and sequencing is critical when recording changes in an employee's leave of absence status.

Effective Dating

The **Effective Date** indicates when an action or event is in effect or valid. Each employee record is effective dated. PeopleSoft is designed to automatically perform certain functions based on the Effective Date. Effective Dating provides a mechanism for determining if a transaction is current, history, or future.

Some pages will display the word **Current, History, or Future** so you can always tell what type of transaction you are viewing. Every action taken on an employee will have an effective date. Because we have been in production for multiple fiscal years there may be more than one record associated with an employee. Future dated actions may be in the system but PeopleSoft does not act on that information until the actual day of the effective date.

Current: Closest to but not exceeding today's date.
Future: Greater than today's date.
History: Prior to current date effective date.

Note: It is very important to use the correct date for new hires, rehires, and terminations as these dates impact benefits and compensation.

Multiple Actions

It is necessary to use **Effective Sequencing** when more than one action occurs on the same **Effective Date**.

Example 1:

STEP 1: When an employee acquires a new dependent, the first entry (sequence **0**) inserted into the **Action/Reason** fields indicate the action of **Paid Leave of Absence** with a reason of **(FML) Paid FMLA Use Accrued Time**.

STEP 2: To enter a second event on the same effective date, click the **Add A Row** button to insert a new row. The second entry (sequence **1**) inserted into the **Action/Reason** fields indicate the action of **Family Status Change** with a reason of **(ACI) Acquire Dep Eff on Event Dt** .

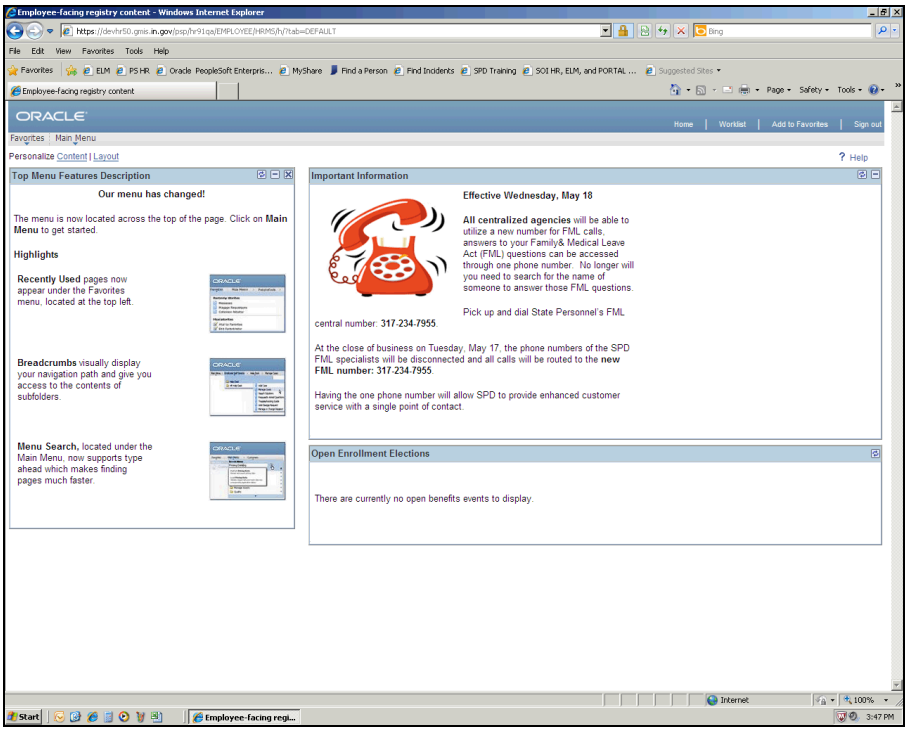
Example 2:

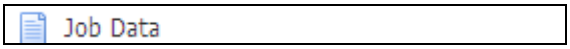
STEP 1: When an employee is promoted within their own agency, the first entry (sequence **0**) inserted into the **Action/Reason** fields indicate the action of **Promotion** with a reason of **(PSA) Promotion - Same Agency**.

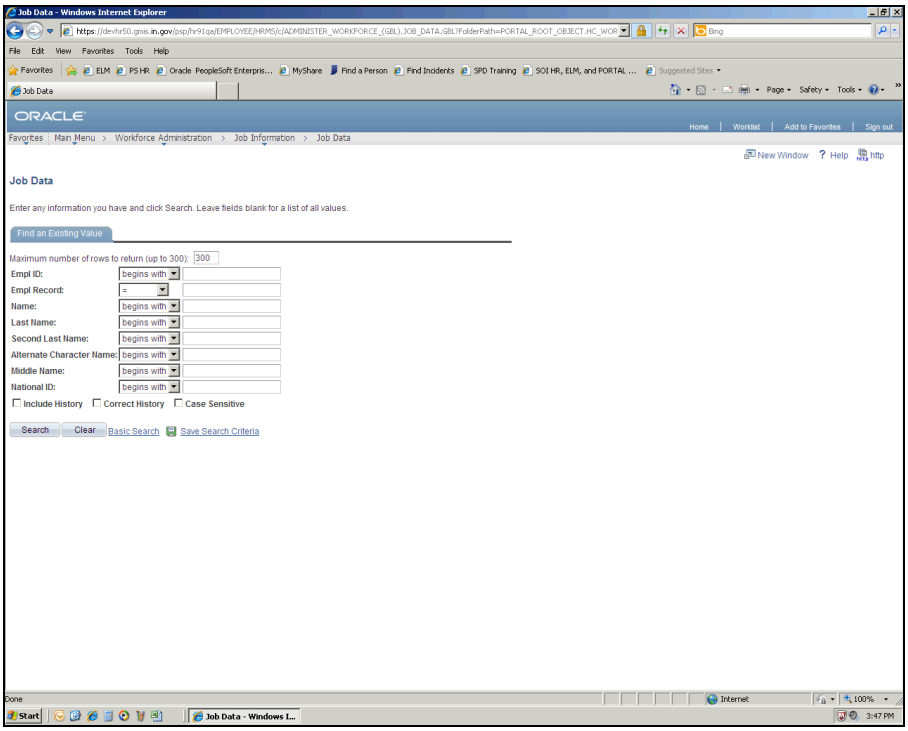
STEP 2: To enter a second event on the same effective date, click the **Add A Row** button to insert a new row. The second entry (sequence **1**) inserted into the **Action/Reason** fields indicate the action of **Pay Rate Change** with a reason of **(GSA) General Salary Adjustment** .

Short Term Disability with Pay

Procedure



Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.
4.	Click the **Job Data** link. 

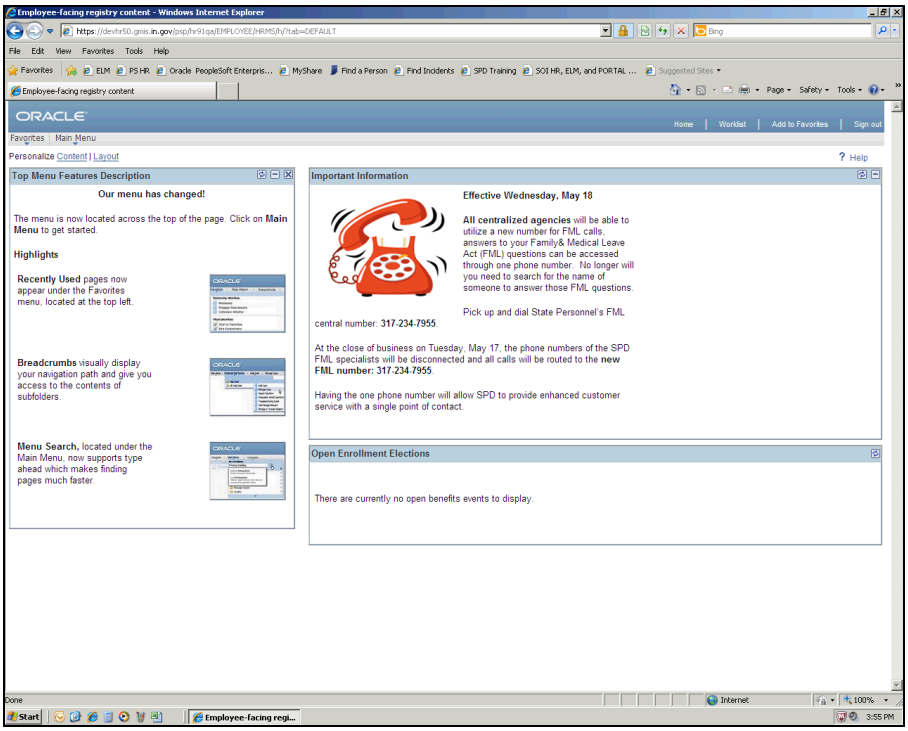


Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
6.	Click the **Search** button. Search
7.	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
8.	Click the **Action** list. Paid Leave of Absence
9.	Click the **Return from Leave** list item. Return from Leave
10.	Click the **Reason** list.
11.	Select the appropriate **Reason**. Click the **Return from Paid Leave** list item. Return from Paid Leave
12.	Click the **Add a new row** button.
13.	Enter the desired information into the **Effective Sequence** field. Enter "**1**".
14.	Click the **Action** list. Return from Leave

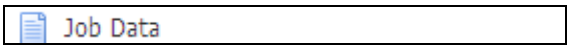
Step	Action
15.	Click the **Short Term Disability with Pay** list item. Short Term Disability with Pay
16.	Click the **Reason** list.
17.	Click the **Short Term Disability With Pay** list item. Short Term Disability With Pay
18.	Click the **Save** button. Save
19.	**End of Procedure.**

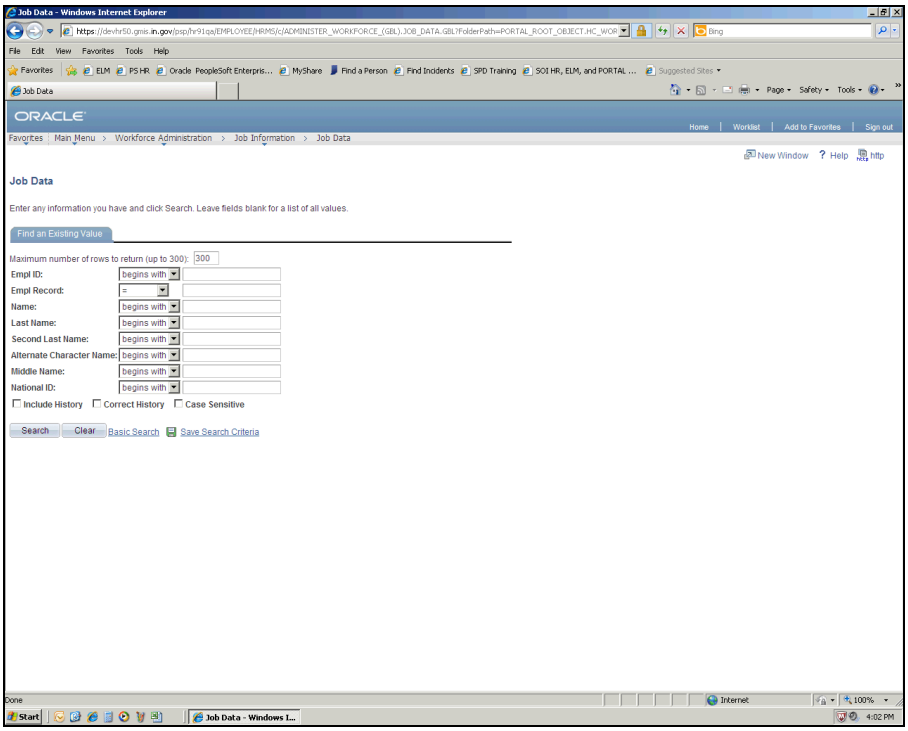
Long Term Disability with Pay

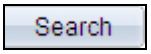
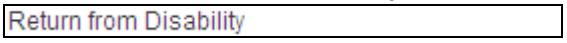
Procedure

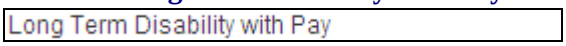
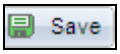


Step	Action
1.	Click the **Main Menu** link. Main Menu
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Job Information** menu.

Step	Action
4.	Click the **Job Data** link. 



Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000272287**".
6.	Click the **Search** button. 
7.	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
8.	Click the **Action** list.
9.	Click the **Return from Disability** list item. 
10.	Click the **Reason** list.
11.	Click the **Return From Disability** list item.
12.	Click the **Add a new row** button.

Step	Action
13.	Enter the desired information into the **Effective Sequence** field. Enter "**1**".
14.	Click the **Action** list.
15.	Click the **Long Term Disability with Pay** list item. 
16.	Click the **Reason** list.
17.	Click the **Long Term Disability With Pay** list item.
18.	Click the **Save** button. 
19.	**End of Procedure.**

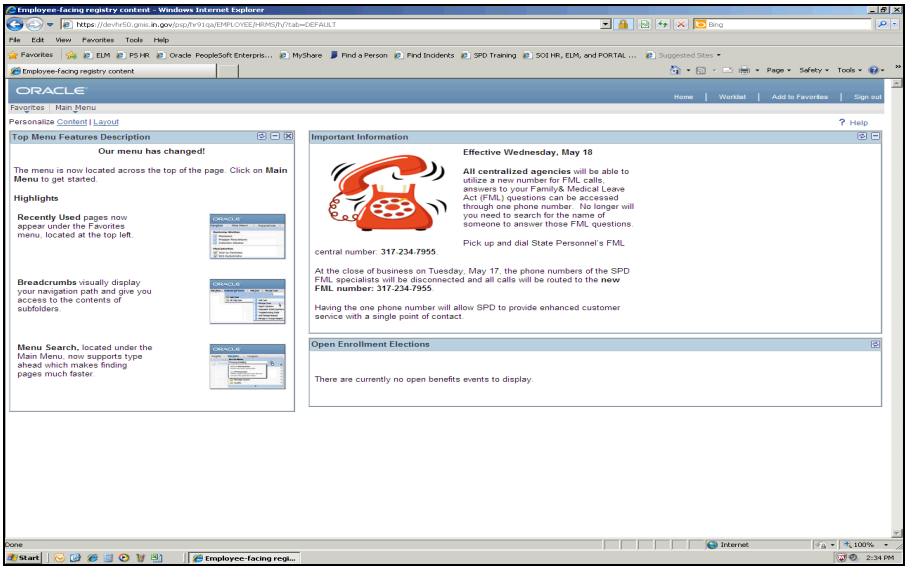
Updating Personal Information

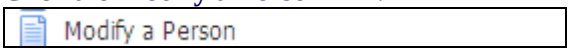
Personal information changes most often occur to a person's **Biographical Information** or **Emergency Contact Information**.

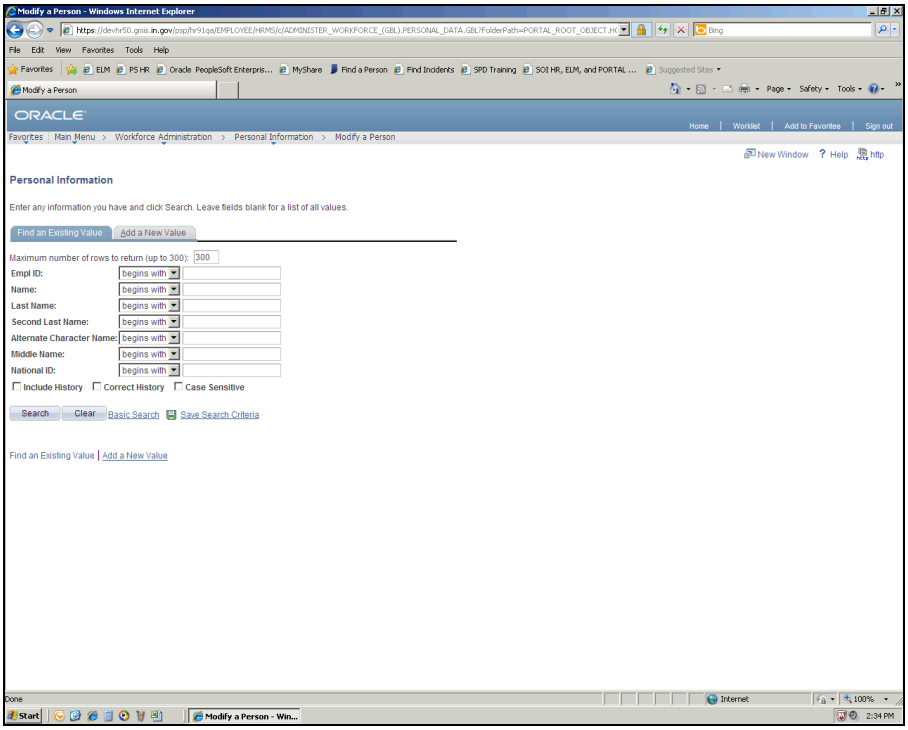
- Biographical information includes items such as name, marital status, address, phone, etc. Name, marital status, and education status changes **REQUIRE** legal documentation before the change can be entered into the system.
- Emergency contacts are individuals identified by the worker to be contacted if the worker has a personal emergency while on the job.

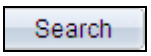
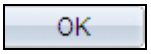
Updating Personal Information

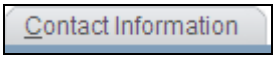
Procedure

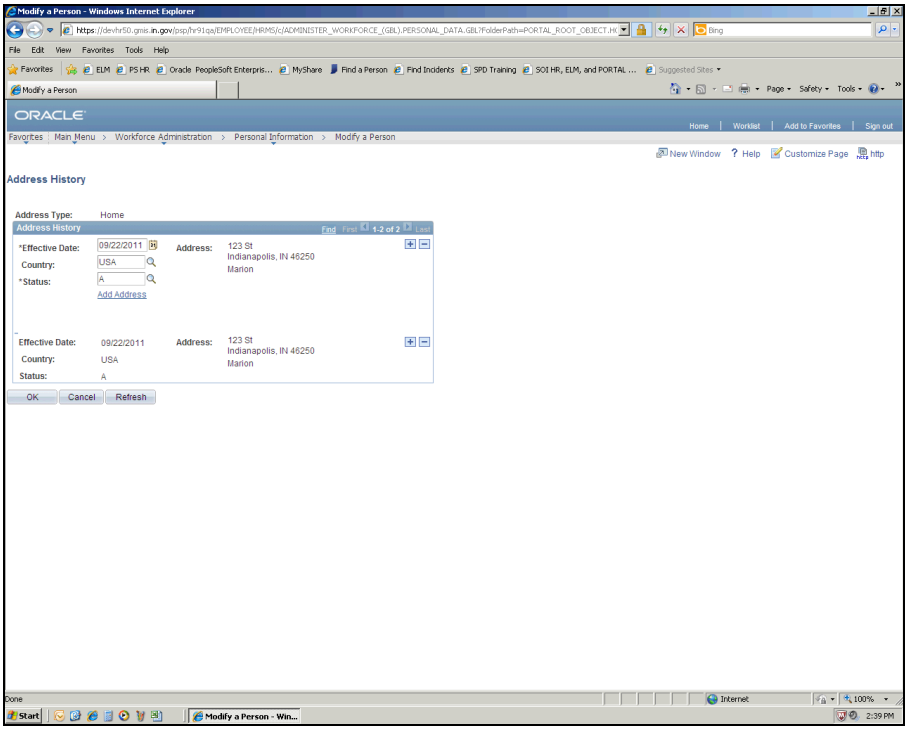


Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Click the **Modify a Person** link. 

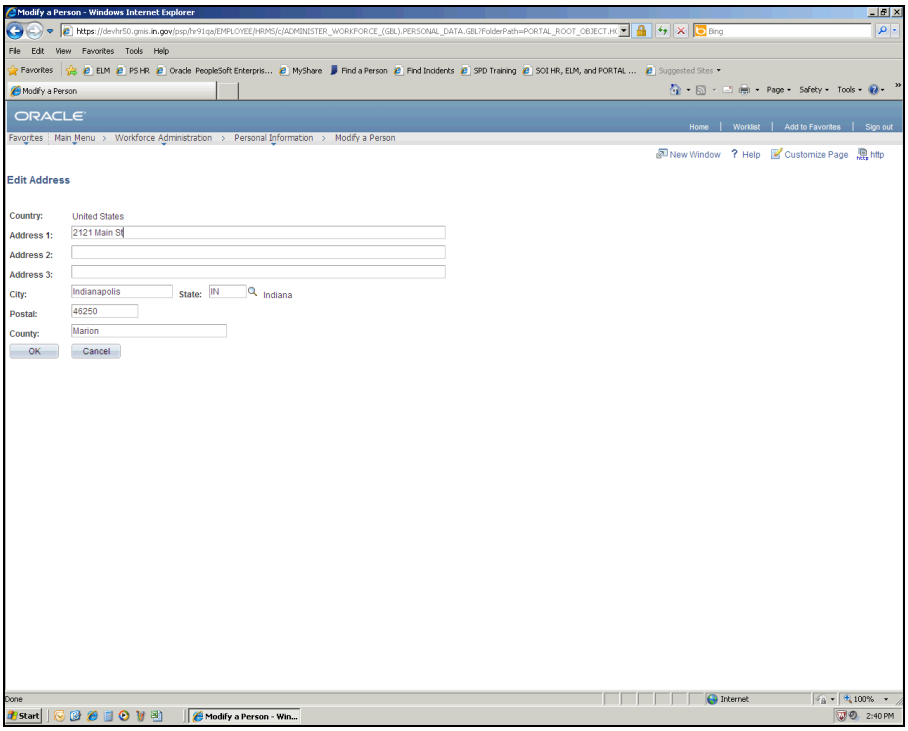


Step	Action
5.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
6.	Click the **Search** button. 
7.	Click the **Add a new row** button.
8.	Update the **Effective Date** field if necessary. Click the **Edit Name** button.
9.	Enter the desired information into the **Middle Name** field. Enter "**Michael**".
10.	Click the **OK** button. 

Step	Action
11.	Click the **Add a new row** button.
12.	Update the **Effective Date** field of necessary. Click the **Marital Status** list.
13.	Click the **Married** list item.
14.	Enter the desired information into the **As of** field. Enter "**09/22/2011**".
15.	Click the **Contact Information** tab. 
16.	Click the **View Address Detail** link.
17.	Click the **Add a new row** button.



Step	Action
18.	Change the **Effective Date** field if necesary. Click the **Add Address** link.

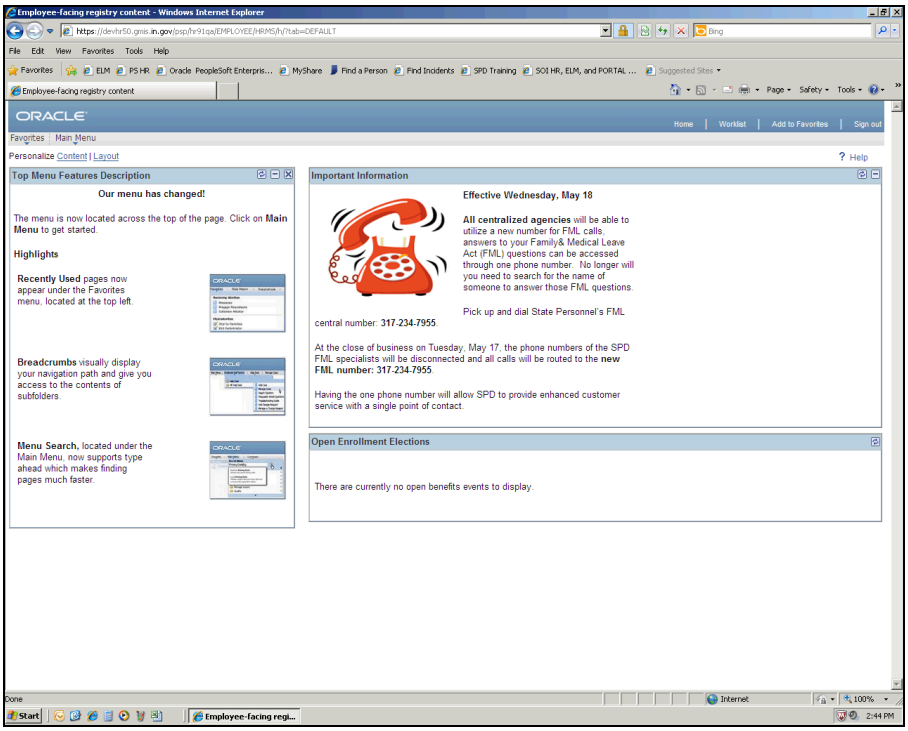


Step	Action
19.	Edit the address as required. Enter the desired information into the **Address 2** field. Enter "**Apt B**".
20.	Click the **OK** button. OK
21.	Click the **OK** button. OK
22.	Add rows or edit the telephone and email information as appropriate. Click the **Regional** tab. Regional
23.	Verify that the **Ethnic Group** field is correct. Click the look up button to make a change, if necessary. Click the **Save** button. Save
24.	**End of Procedure.**

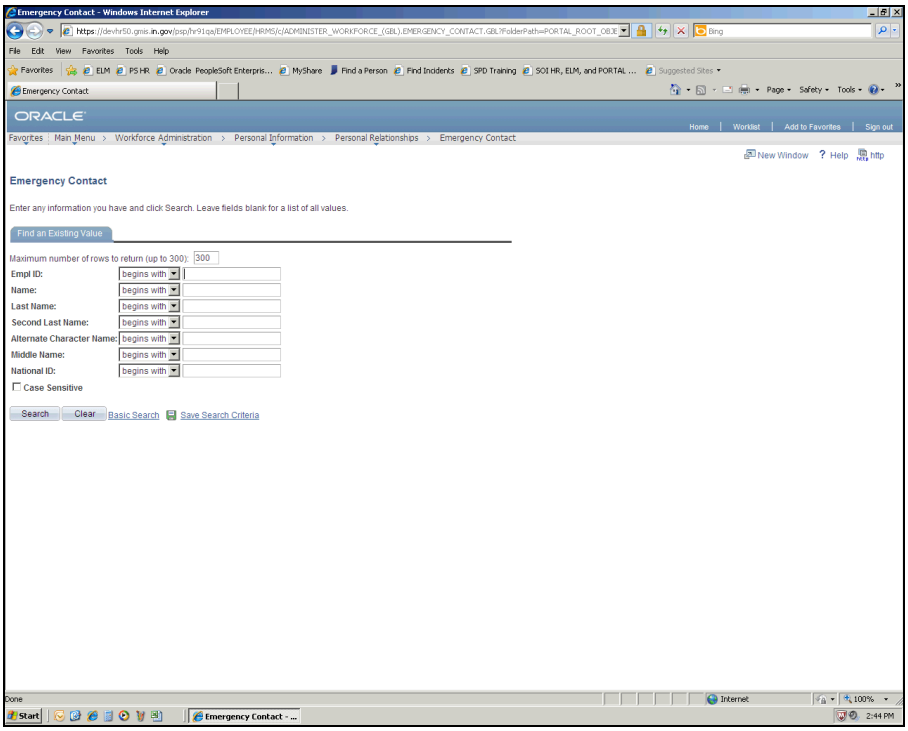
Updating Emergency Contact Information

Procedure

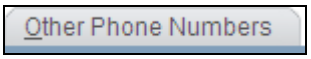
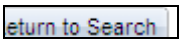
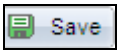
Note: Employees can also update emergency contacts in PeopleSoft Self Service.



Step	Action
1.	Click the **Main Menu** link. Main Menu
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Point to the **Personal Relationships** menu.
5.	Click the **Emergency Contact** link. Emergency Contact



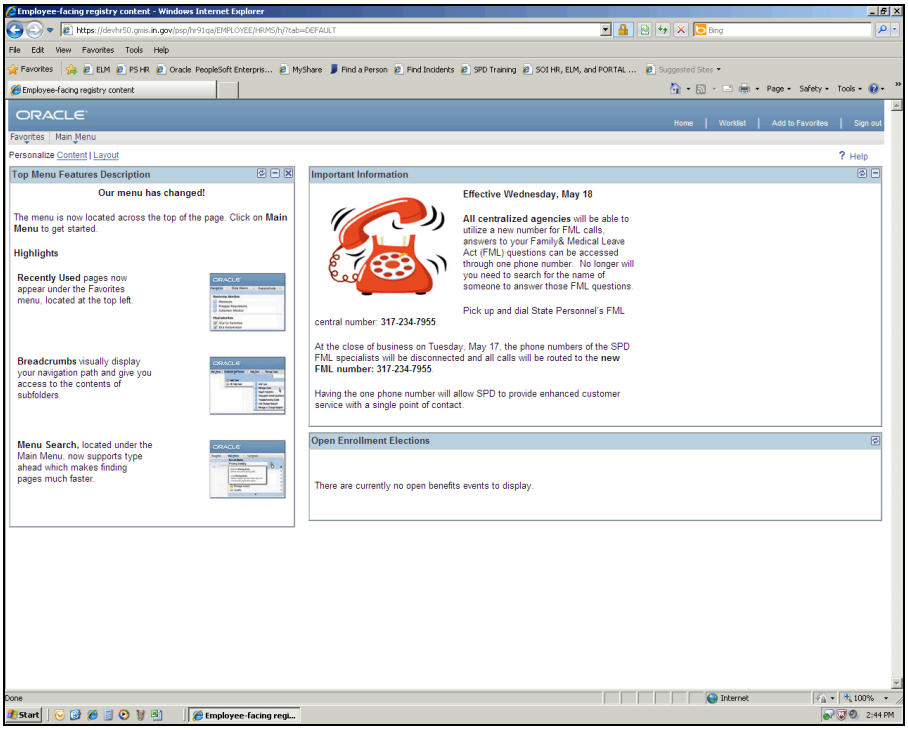
Step	Action
6.	Enter the desired information into the **Empl ID** field. Enter "**10000280299**".
7.	Click the **Search** button. Search
8.	Enter the desired information into the **Contact Name** field. Enter "**Mary Christmas**".
9.	Click the **Relationship to Employee** list. Other
10.	Click the **Spouse** list item. Spouse
11.	Click the **Primary Contact** option. Primary Contact
12.	Click the **Edit Address** button. Edit Address
13.	Enter the desired information into the **Address 1** field. Enter "**2121 Main St**".
14.	Enter the desired information into the **Address 2** field. Enter "**Apt B**".
15.	Enter the desired information into the **City** field. Enter "**Indianapolis**".
16.	Enter the desired information into the **State** field. Enter "**IN**".
17.	Enter the desired information into the **Postal** field. Enter "**46201**".
18.	Enter the desired information into the **County** field. Enter "**Marion**".
19.	Click the **OK** button. OK

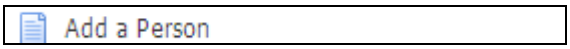
Step	Action
20.	Enter the desired information into the **Phone** field. Enter "**317-555-1212**".
21.	Click the **Other Phone Numbers** tab. 
22.	***RESHOOT THIS SCREEN TO GET ACTION TO LAND IN CORRECT PLACE.*** Click the **Mobile** list item. 
23.	Enter the desired information into the **Phone** field. Enter "**317-555-2345**".
24.	Click the **Save** button. 
25.	**End of Procedure.**

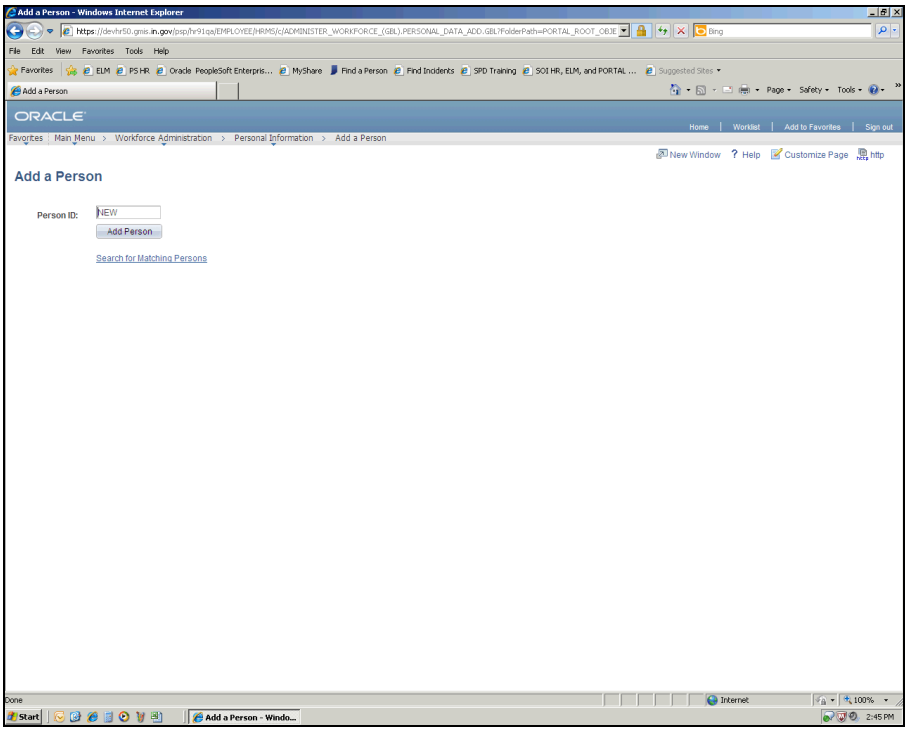
Contingent (Contract) Worker

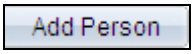
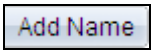
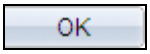
Add Contingent (Contract) Worker

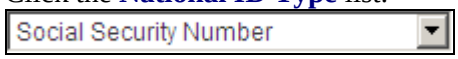
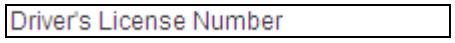
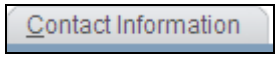
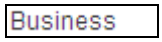
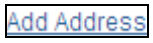
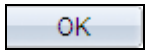
Procedure

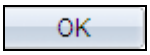
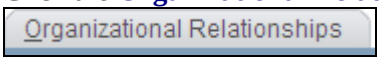
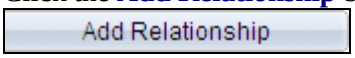
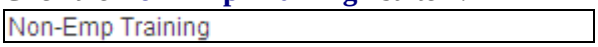


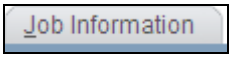
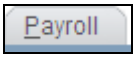
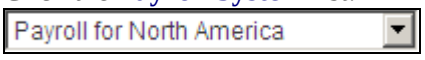
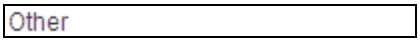
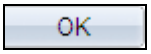
Step	Action
1.	Click the **Main Menu** link.
2.	Point to the **Workforce Administration** menu.
3.	Point to the **Personal Information** menu.
4.	Click the **Add a Person** link. 



Step	Action
5.	Click the **Add Person** button. 
6.	Click the **Add Name** button. 
7.	Enter the desired information into the **Birth Location** field. Enter "**Richard**".
8.	Enter the desired information into the **Middle Name** field. Enter "**A.**".
9.	Enter the desired information into the **Last Name** field. Enter "**Roe**".
10.	Click the **OK** button. 

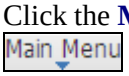
Step	Action
11.	While **Unknown** is an available choice, you **must** select either **Female** or **Male.** Click the **Gender** list.
12.	Click the **Male** list item.
13.	Click the **National ID Type** list. 
14.	Click the **Driver's License Number** list item. 
15.	Enter the desired information into the **National ID** field. Enter "**11223344**".
16.	Click the **Contact Information** tab. 
17.	Click the **Add a new row** button.
18.	Click the **Address Type** list.
19.	Click the **Business** list item. 
20.	Click the **Delete row** button.
21.	Click the **OK** button.
22.	Click the **Add Address Detail** link.
23.	Click the **Add Address** link. 
24.	When making corrections to the employee's address, use the correct postal abbreviations. Do not use punctuation (ex: periods after abbreviations). To view a list of address abbreviations, go to **https://www.usps.com/ship/official-abbreviations.htm**. Enter the desired information into the **Address 1** field. Enter "**100 N. Senate**".
25.	Enter the desired information into the **City** field. Enter "**Indianapolis**".
26.	Enter the desired information into the **State** field. Enter "**IN**".
27.	Enter the desired information into the **Postal** field. Enter "**46204**".
28.	Always confirm/enter the contractor's county. Enter the desired information into the **County** field. Enter "**Marion**".
29.	Click the **OK** button. 

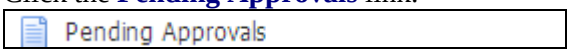
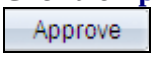
Step	Action
30.	Click the **OK** button. 
31.	Click the **Phone Type** list.
32.	Click the **Business** list item.
33.	Enter the desired information into the **Telephone** field. Enter "**317-232-8000**".
34.	Click the **Preferred** option.
35.	Click the **Email Type** list.
36.	Click the **Business** list item.
37.	Enter the desired information into the **Email Address** field. Enter "**rroe@agency.in.gov**".
38.	Click the **Preferred** option.
39.	Click the **Organizational Relationships** tab. 
40.	Click the **Contingent Worker** option.
41.	Click the **Add Relationship** button. 
42.	The **Empl ID** number is now available. The **Action** field will default to **Add Contingent Worker**. Click the **Reason** list.
43.	Click the **Non-Emp Training** list item. 
44.	Click the **Look up Business Unit** button.
45.	Enter the desired information into the **Business Unit** field. Enter "**00070**".
46.	Click the **Look Up** button.
47.	Click the **State Personnel Department** link.
48.	Click the **Look up Department** button.

Step	Action
49.	Enter the desired information into the **Description** field. Enter "**spd**".
50.	Click the **Look Up** button.
51.	Click the scrollbar.
52.	Click the **SPD - Communications** link.
53.	Click the **Job Information** tab. 
54.	Click the **Look up Job Code** button.
55.	Enter the desired information into the **Description** field. Enter "**non**".
56.	Click the **Look Up** button.
57.	Click the **Non-Employee** link.
58.	Click the **Payroll** tab. 
59.	Click the **Payroll System** list. 
60.	Click the **Other** list item. 
61.	Click the **OK** button. 
62.	**End of Procedure.**

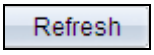
Appendixes

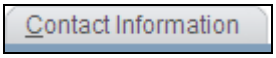
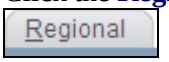
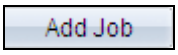
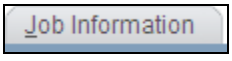
Appendix A: Modify/Approve/Deny a Job Opening Job Aid

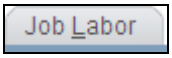
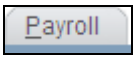
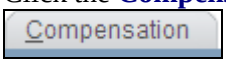
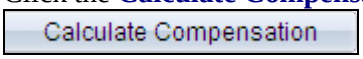
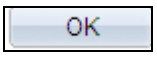
Step	Action
	Click the **Main Menu** button. 
	Point to the **Recruiting** menu.

Step	Action
	Click the **Pending Approvals** link. 
	Click on the job title link you wish to approve. Click the **Job Approval: Security Officer 4 Seasonal** link.
	The supervisor can modify the job posting by selecting any of the tabs at the top and edit the fields as needed. Click the **Approvals** tab.
	The supervisor can approve or deny the job posting at this stage by selecting the appropriate button. Click the **Approve** button. 
	Press the left mouse button over the scrollbar and drag the scrollbar to the bottom of the page. Click the scrollbar.
	Click the **Save** link.
	End of procedure **End of Procedure.**

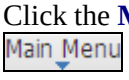
Appendix B: Demotion in Manage Hires Job Aid

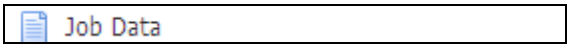
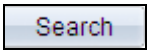
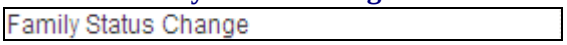
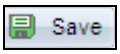
Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Personal Information** menu.
	Click the **Manage Hires** link.
	Adjust the From and To fields to reflect the desired time frame. Enter the desired information into the **From** field. Enter a valid value e.g. "**05/22/2011**".
	Click the **Refresh** button. 

Step	Action
	Clicking the column heading will sort the names in alphabetical order. Click the **Name** column header.
	Locate the name in the list. Click the scrollbar.
	Click the **Name** link.
	Click the scrollbar.
	Click the **View / Edit Person** link.
	If the employee is being demoted to a position within the same agency, add rows only if the personal data has changed. If the employee is being demoted to a position from a different agency - with a different benefit plan (**example**: DOC to ISP) add a row to each area of personal data and enter the **Effective Date** of the transfer. Click the **Contact Information** tab. 
	Add rows to update the employee's address, telephone and email addresses if necessary. Click the **Regional** tab. 
	Confirm that the **Ethnic Group** field is entered correctly. Click the **Ethnic Group** look up button to change this value if necessary. In this example, no information was changed. Click the **Cancel** button.
	Click the **Add Job** button. 
	The **Action** field will automatically populate to **Transfer**. Click the **Reason** list.
	Click the **Demotion Same Agency** list item.
	Click the **Job Information** tab. 

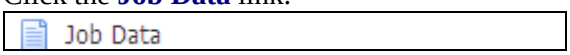
Step	Action
	Review the information on this screen for accuracy. Click the **Job Labor** tab. 
	Review the **Union Seniority Date** field to ensure that the field reflects the employee's original date of hire/rehire. Click the **Payroll** tab. 
	Verify that the **Pay Group** field populated correctly. Click the **Compensation** tab. 
	Adjust the biweekly compensation rate if necessary. Click the **Calculate Compensation** button. 
	Click the **Employment Data** link.
	Change the **Probation Date** if necessary. Click the **Benefits Program Participation** link.
	If necessary, update the **BAS Group ID**. Click the **Look up BAS Group ID** button.
	Click the **RG1** link.
	Click the **OK** button. 
	End of Procedure.

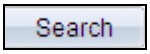
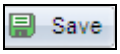
Appendix C: Entering a Family Status Change Job Aid

Step	Action
	Click the **Main Menu** link. 

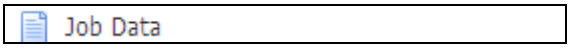
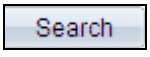
Step	Action
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 
	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
	Click the **Action** list.
	Click the **Family Status Change** list item. 
	Click the **Emp Marriage Eff on Event Dt** list item.
	As a result of a marriage, divorce or death of a spouse, the employee's personal data may require modification. In this example, the employee has submitted a family status change due to marriage, which may require the user to update the employee's **last name** and **marital status**. See the *Updating Personal Information* procedure. Click the **Save** button. 
	End of Procedure.

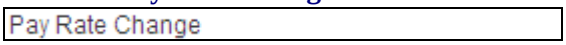
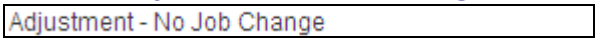
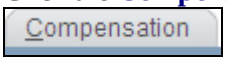
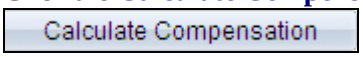
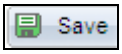
Appendix D: Entering a Paid Leave of Absence Job Aid

Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 

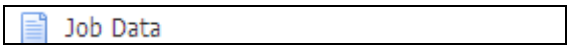
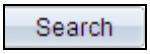
Step	Action
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 
	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
	Click the **Action** list.
	Click the **Paid Leave of Absence** list item.
	Click the **Reason** list.
	Select the appropriate **Reason**. Click the **Paid FMLA Use Accrued Time** list item.
	Click the **Save** button. 
	End of Procedure.

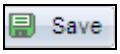
Appendix E: Entering a Pay Rate Change Job Aid

Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 
	Click the **Add a new row** button.

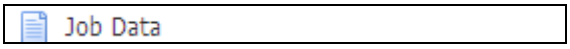
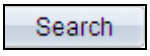
Step	Action
	Update the **Effective Date** field if necessary. Click the **Action** list.
	Click the **Pay Rate Change** list item. 
	Click the **Reason** list.
	Select the appropriate **Reason**. Click the **Adjustment - No Job Change** list item. 
	Click the **Compensation** tab. 
	Enter the desired information into the **Comp Rate** field. Enter a valid value e.g. "**1301**".
	Click the **Calculate Compensation** button. 
	Click the **Save** button. 
	End of Procedure.

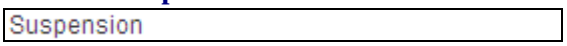
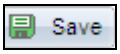
Appendix F: Entering a Return from Paid Leave Job Aid

Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 

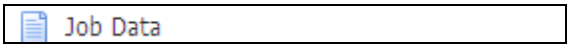
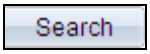
Step	Action
	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
	Click the **Action** list.
	Click the **Return from Leave** list item.
	Click the **Reason** list.
	Select the appropriate **Reason**. Click the **Return from Paid Leave** list item.
	Click the **Save** button. 
	End of Procedure.

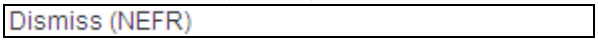
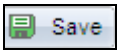
Appendix G: Entering a Suspension Job Aid

Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 
	Change the **Effective Date** field if necessary. Click the **Add a new row** button.

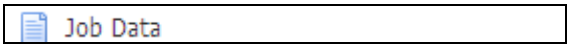
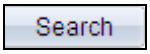
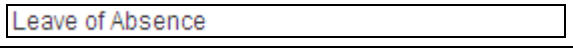
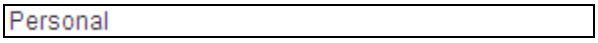
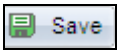
Step	Action
	Click the **Action** list.
	Click the **Suspension** list item. 
	Click the **Disciplinary Action** list item.
	Click the **Save** button. 
	End of Procedure.

Appendix H: Entering a Termination Job Aid

Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 
	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
	Click the **Action** list.
	If the employee is retiring, use the **Retirement Action** and **Reason** (not **Termination**). Click the **Termination** list item.
	Click the **Reason** list.

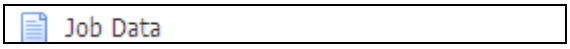
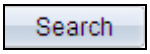
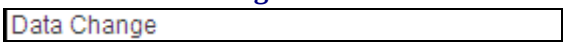
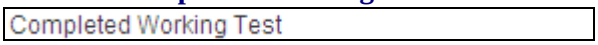
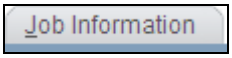
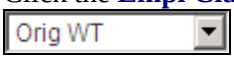
Step	Action
	Select the appropriate **Reason** from the list. Click the **Dismiss (NEFR)** list item. 
	Click the **Save** button. 
	End of Procedure.

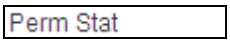
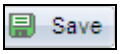
Appendix I: Entering a Unpaid Leave of Absence Job Aid

Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000272287**".
	Click the **Search** button. 
	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
	Click the **Action** list.
	Click the **Leave of Absence** list item. 
	Click the **Reason** list.
	Select the appropriate **Reason**. Click the **Personal** list item. 
	Click the **Save** button. 

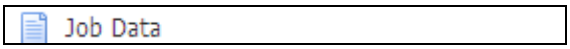
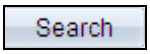
Step	Action
	End of Procedure.

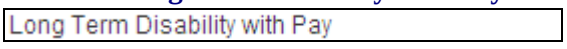
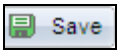
Appendix J: Entering Permanent Status Job Aid

Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 
	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
	Click the **Data Change** list item. 
	Click the **Reason** list.
	Select the appropriate **Reason** (**Completed Working Test**/**Extended Working Test**) from the drop-down list. Click the **Completed Working Test** list item. 
	Click the **Job Information** tab. 
	Click the **Empl Class** list. 

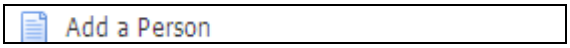
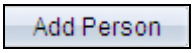
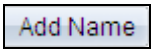
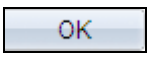
Step	Action
	Select the appropriate employee class (**Perm Stat**, **XOrig WT** or **XPromo WT**) from the list of values. If extending the working test, be sure to change the probation date as appropriate. Click the **Perm Stat** list item. 
	Click the **Save** button. 
	End of Procedure.

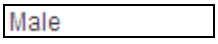
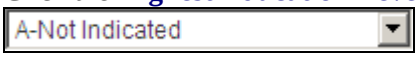
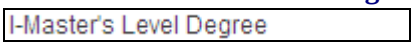
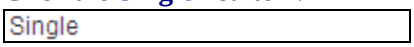
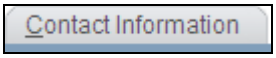
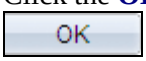
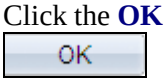
Appendix K: Long Term Disability with Pay Job Aid

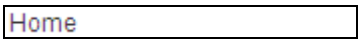
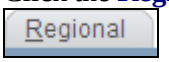
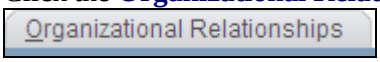
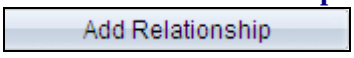
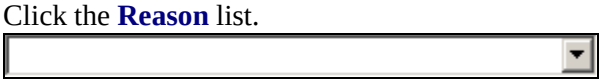
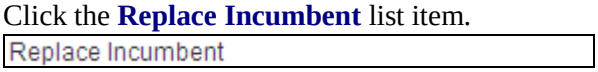
Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000272287**".
	Click the **Search** button. 
	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
	Click the **Action** list.
	Click the **Return from Disability** list item.
	Click the **Reason** list.
	Click the **Return From Disability** list item.
	Click the **Add a new row** button.

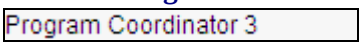
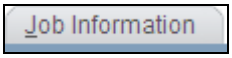
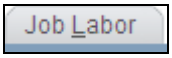
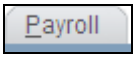
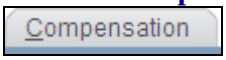
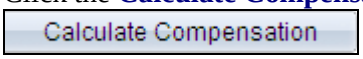
Step	Action
	Enter the desired information into the **Effective Sequence** field. Enter a valid value e.g. "**1**".
	Click the **Action** list.
	Click the **Long Term Disability with Pay** list item. 
	Click the **Reason** list.
	Click the **Long Term Disability With Pay** list item.
	Click the **Save** button. 
	End of Procedure.

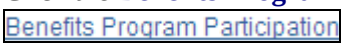
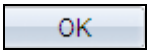
Appendix L: New Hire (Direct) Job Aid

Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Personal Information** menu.
	Click the **Add a Person** link. 
	Click the **Add Person** button. 
	Click the **Add Name** button. 
	The employee's name entered into PeopleSoft must match what is shown on their Social Security card. Enter the desired information into the **First Name** field. Enter a valid value e.g. "**John**".
	Enter the desired information into the **Middle Name** field. Enter a valid value e.g. "**Q.**".
	Enter the desired information into the **Last Name** field. Enter a valid value e.g. "**Doe**".
	Click the **OK** button. 
	Enter the desired information into the **Date of Birth** field. Enter a valid value e.g. "**01/01/1976**".

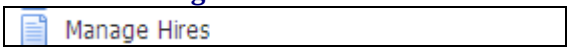
Step	Action
	Click the **Gender** list.
	While **Unknown** is an available choice, you **must** select either **Female** or **Male.** Click the **Male** list item. 
	Click the **Highest Education Level** list. 
	Click the **I-Master's Level Degree** list item. 
	Click the **Marital Status** list.
	Click the **Single** list item. 
	Enter the desired information into the **National ID** field. Enter a valid value e.g. "**111-22-3333**".
	Click the **Contact Information** tab. 
	Click the **Add Address Detail** link.
	Click the **Add Address** link.
	When making corrections to the employee's address, use the correct postal abbreviations. Do not use punctuation (ex: periods after abbreviations). To view a list of address abbreviations, go to **https://www.usps.com/ship/official-abbreviations.htm**. Enter the desired information into the **Address 1** field. Enter a valid value e.g. "**1234 Elm St.**".
	Enter the desired information into the **City** field. Enter a valid value e.g. "**Beech Grove**".
	Enter the desired information into the **State** field. Enter a valid value e.g. "**IN**".
	Enter the desired information into the **Postal** field. Enter a valid value e.g. "**46201**".
	Always confirm/enter the employee's county. Enter the desired information into the **County** field. Enter a valid value e.g. "**Marion**".
	Click the **OK** button. 
	Click the **OK** button. 
	Click the **Phone Type** list.

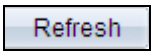
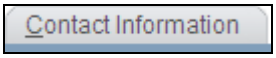
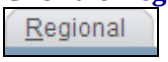
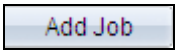
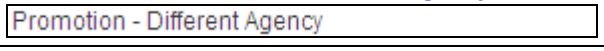
Step	Action
	Click the **Home** list item. 
	Enter the desired information into the **Telephone** field. Enter a valid value e.g. "**317-555-1212**".
	State Personnel will be utilizing home and business email addresses to contact employees in the future regarding important events (i.e. Open Enrollment). Please be sure to collect an email address from as many employees as possible. Click the **Email Type** list.
	Click the **Home** list item.
	Enter the desired information into the **Email Address** field. Enter a valid value e.g. "**jdoe@msn.com**".
	Click the **Preferred** option.
	Click the **Regional** tab. 
	An employee's ethnic group is **REQUIRED.** If the ethnic group is not noted by the employee or the employee refuses to give this information, use a visual observation to make the best selection. If the **Ethnic Group** field is left as **Unknown,** EEO/AA reporting will be inaccurate. Click the **Look up Ethnic Group** button.
	Click the **White** link.
	Click the **Organizational Relationships** tab. 
	Click the **Employee** option.
	Click the **Add Relationship** button. 
	The **Empl ID** number is now available. Confirm that the **Effective Date** field reflects the **Effective Date of Hire**. Enter the desired information into the **Effective Date** field. Enter a valid value e.g. "**09/26/2011**".
	The **Action** field will default to **Hire**. Click the **Reason** list. 
	Click the **Replace Incumbent** list item. 

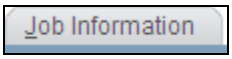
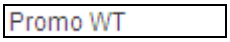
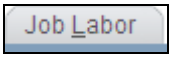
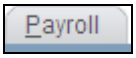
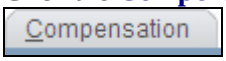
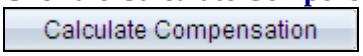
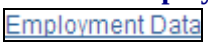
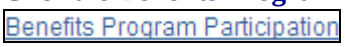
Step	Action
	Enter the desired information into the **Position Number** field. Enter a valid value e.g. "**100654**".
	Click the **Program Coordinator 3** object. 
	Pressing the Tab key on the keyboard causes much of the position data to populate. Press **[Tab]**.
	Click the **Job Information** tab. 
	Click the **Empl Class** list.
	Select the designated status of the employee. The most common new hire statuses are: **Orig WT**: Agencies with classified employees use this status to activate the six-month working test probation period. **Quasi**: Quasi agencies. **Appointed**: Appointed positions. Click the **Orig WT** list item.
	Click the **Job Labor** tab. 
	The **Union Seniority Date** field indicates the employee's seniority date only. This field does not indicate membership in a union. This should be the employee's date of hire. Enter the desired information into the **Union Seniority Date** field. Enter a valid value e.g. "**09/26/2011**".
	Click the **Payroll** tab. 
	Verify that the correct pay group defaults into the employee's record (example: **PYA** is Pay Group A and **PYB** is Pay Group B). Click the **Compensation** tab. 
	If the employee's starting salary is above the minimum of the hiring range, enter the adjusted compensation rate into the **Comp Rate** field. Enter the desired information into the **Comp Rate** field. Enter a valid value e.g. "**2500**".
	Click the **Calculate Compensation** button. 

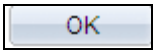
Step	Action
	Click the **Employment Data** link.
	Confirm the **Company Seniority Date** and the **Benefits Service Date** fields are accurate. An inaccurate **Benefits Service Date** may impact the availability of employee benefits. Enter the employee's probation date into the **Probation Date** field. (The probation date is six months from the date of hire) An inaccurate probation date may impact the availability of employee benefits. Enter the desired information into the **Probation Date** field. Enter a valid value e.g. "**03/26/2012**".
	Click the **Benefits Program Participation** link. 
	Select the correct **BAS Group ID**. BAS is the Benefits Administration Selection schedule for the agency. Click the **Look up BAS Group ID** button.
	Click the **Regular Employees Group 1** link.
	Confirm that the **Effective Date** is correct and write the **Empl ID** number from the top of the screen on the Personnel Payroll Action Form (PPAF form). Click the **OK** button. 
	End of Procedure.

Appendix M: Promotion in Manage Hires Job Aid

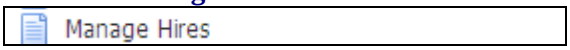
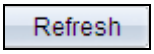
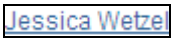
Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Personal Information** menu.
	Click the **Manage Hires** link. 
	Adjust the **From** and **To** fields to reflect the desired time frame. Enter the desired information into the **From** field. Enter a valid value e.g. "**05/12/2011**".

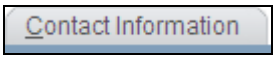
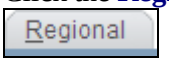
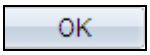
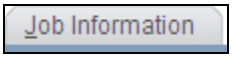
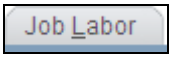
Step	Action
	Click the **Refresh** button. 
	Clicking the column heading will sort the names in alphabetical order. Click the **Name** column header.
	Locate the name in the list. Click the scrollbar.
	Click the **Name** link.
	If the employee is changing agencies, the **Type of Hire** field shows the value of **Transfer**. Click the scrollbar.
	Click the **View / Edit Person** link.
	If the employee is being promoted to a new position within the same agency, add rows only if the personal data has changed. Add a row to update the **Effective Date** of the promotion as appropriate. Click the **Contact Information** tab. 
	Add rows to update the employee's address, telephone and email addresses if necessary. Click the **Regional** tab. 
	Confirm that the **Ethnic Group** field is entered correctly. Click the **Ethnic Group** look up button to change this value if necessary. In this example, no information was changed. Click the **Cancel** button.
	Click the **Add Job** button. 
	The **Action** field will automatically populate to **Transfer**. Click the **Reason** list.
	Click the **Promotion - Different Agency** list item. 

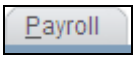
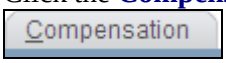
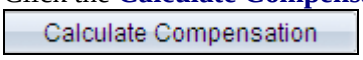
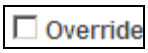
Step	Action
	Click the **Job Information** tab. 
	Click the **Empl Class** list.
	Click the **Promo WT** list item. 
	Click the **Job Labor** tab. 
	Review the **Union Seniority Date** field to ensure that the field reflects the employee's original date of hire/rehire. Click the **Payroll** tab. 
	Verify that the **Pay Group** field populated correctly. Click the **Compensation** tab. 
	Adjust the biweekly compensation rate if necessary. Enter the desired information into the **Comp Rate** field. Enter a valid value e.g. "**1800**".
	Click the **Calculate Compensation** button. 
	Click the **Employment Data** link. 
	If necessary, enter the new **Probation Date**. Enter the desired information into the **Catalog Item Abstract** field. Enter a valid value e.g. "**03/22/2012**".
	Click the **Benefits Program Participation** link. 
	If necessary, update the **BAS Group ID**. Click the **Look up BAS Group ID** button.
	Click the **RG1** link.

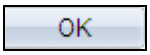
Step	Action
	PROOF & VERIFY the information entered into the employee record!!! Once a record is saved, the record is there until the State Personnel Department's Data Entry corrects the record. Inaccurate or missing information may impact employee benefits and *could even possibly terminate them*. Click the **OK** button. 
	End of Procedure.

Appendix N: Rehire in Manage Hires Job Aid

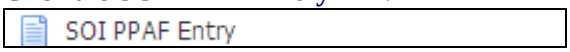
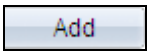
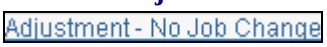
Step	Action
	Click the **Main Menu** link.
	Point to the **Personal Information** menu.
	Click the **Manage Hires** link. 
	Adjust the **From** and **To** fields to reflect the correct time frame. Enter the desired information into the **From** field. Enter a valid value e.g. "**5/12/2011**".
	Click the **Refresh** button. 
	Click the **Name** link. 
	Confirm the following fields: **Type of Hire**: Shows the option Rehire. **Desired Start Date**: Indicates the Effective Date of Hire. **Employee ID Verified**: If active, click this link to confirm there is not another Employee ID number to avoid duplication. Click the scrollbar.
	Click the **Add Person** button.

Step	Action
	Verify the **Effective Date** field reflects the effective date of rehire. If the employee's name is incorrect, you can click the **Edit Name** button to make those corrections. The employee's name in PeopleSoft should match what is on their Social Security card. Confirm that the **Date of Birth, Gender, Marital Status, Highest Education Level** and **National ID** fields are correct. Click the **Contact Information** tab. 
	Information on the **Contact Information** tab must be effective dated with the employee's effective date of hire. Remember to add rows to avoid overwriting employee history. Click the **Regional** tab. 
	Verify that the employee's ethnic group is recorded. Click on the **Ethnic Group** look up button to find and select the correct value. Click the **OK** button. 
	Scroll to the bottom of the page. Click the scrollbar.
	Click the **Add Job** button.
	The **Action** field will default to **Rehire.** Click the **Reason** list.
	Click the **Rehire - Replace** list item.
	Click the **Job Information** tab. 
	Change the value of the **Empl Class** field if necessary. Click the **Job Labor** tab. 
	The **Union Seniority Date** field will default to the employee's previous seniority date. This field is required (by all agencies) or benefits may be affected. Enter the most recent date of hire into this field. Enter the desired information into the **Union Seniority Date** field. Enter a valid value e.g. "**05/14/2011**".

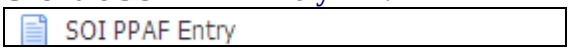
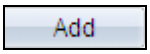
Step	Action
	Click the **Payroll** tab. 
	Confirm that the **Pay Group** field defaulted correctly. Click the **Compensation** tab. 
	Adjust the biweekly compensation rate if necessary. If the employee is hourly, select the appropriate value by clicking the **Rate Code Magnifying** Glass look up button. Click the **Calculate Compensation** button. 
	Click the **Employment Data** link.
	The **Company Seniority Date** is the equivalent of the accrual date. To change the **Company Seniority Date**... Click the **Override** option. 
	Enter the adjusted accrual date. **Note:** for assistance with this field, contact your payroll Specialist at SPD. Enter the desired information into the **Company Seniority Date** field. Enter a valid value e.g. "**05/14/2011**".
	Click the **Override** option.
	The **Benefits Service Date** field should reflect the effective date of rehire. Enter the desired information into the **Benefits Service Date** field. Enter a valid value e.g. "**05/14/2011**".
	If appropriate, enter the correct date into the **Probation Date** field. Click the **Benefits Program Participation** link.
	Enter the BAS Group ID into the **BAS Group ID** field. Note: a list of BAS Group ID's can be found in the Benefits Manual Appendix. Click the **Look up BAS Group ID** button.
	Click the **OFC** link.

Step	Action
	Click the **OK** button. 
	End of Procedure.

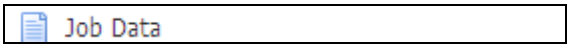
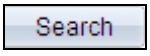
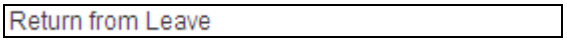
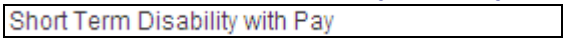
Appendix O: Request Electronic Personnel Action Form (PPAF) - Pay Rate Change Job Aid

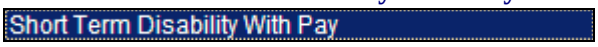
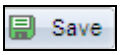
Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **PPAF** menu.
	Click the **SOI PPAF Entry** link. 
	Click the **Add** button. 
	Enter the desired information into the **Employee ID** field. Enter a valid value e.g. "**10000280299**".
	Clicking the **Tab** key on your keyboard will cause the employee's information to populate onto the screen. Press **[Tab]**.
	Enter the desired information into the **Effective Date** field. Enter a valid value e.g. "**09/26/2011**".
	Click the **Look up Action** button.
	Click the **Pay Rate Change** link.
	Click the **Look up Reason** button.
	Click the **Adjustment - No Job Change** link. 
	Enter the desired information into the **Rate** field. Enter a valid value e.g. "**1301**".
	Click the **Submit** button.
	End of Procedure.

Appendix P: Request Electronic Personnel Action Form (PPAF) Job Aid

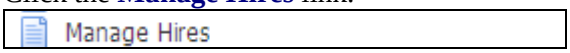
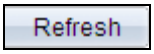
Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **PPAF** menu.
	Click the **SOI PPAF Entry** link. 
	Click the **Add** button. 
	Enter the desired information into the **Employee ID** field. Enter a valid value e.g. "**10000280299**".
	Pressing the **Tab** key on your keyboard will cause all of the employee's information to populate. Press **[Tab]**.
	Enter the desired information into the **Effective Date** field. Enter a valid value e.g. "**09/23/2011**".
	Click the **Look up Action** button.
	Click the **Data Change** link.
	Click the **Look up Reason** button.
	Click the **Extended Working Test** link.
	Click the **Submit** button.
	End of Procedure.

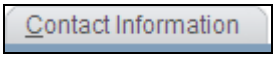
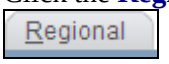
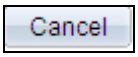
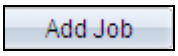
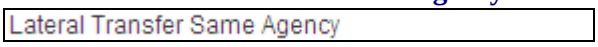
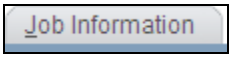
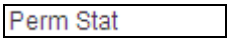
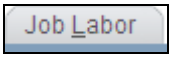
Appendix Q: Short Term Disability with Pay Job Aid

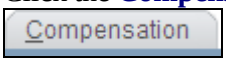
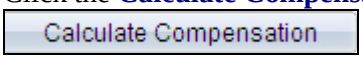
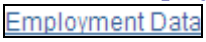
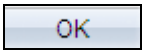
Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Job Information** menu.
	Click the **Job Data** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 
	Update the **Effective Date** field if necessary. Click the **Add a new row** button.
	Click the **Action** list.
	Click the **Return from Leave** list item. 
	Click the **Reason** list.
	Select the appropriate **Reason**. Click the **Return from Paid Leave** list item.
	Click the **Add a new row** button.
	Enter the desired information into the **Effective Sequence** field. Enter a valid value e.g. "**1**".
	Click the **Action** list.
	Click the **Short Term Disability with Pay** list item. 

Step	Action
	Click the **Reason** list.
	Click the **Short Term Disability With Pay** list item. 
	Click the **Save** button. 
	End of Procedure.

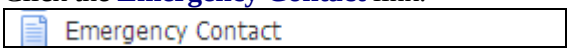
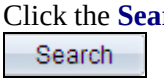
Appendix R: Transfer in Manage Hires Job Aid

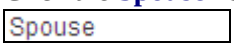
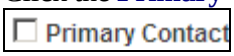
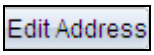
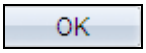
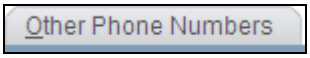
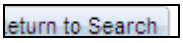
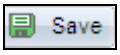
Step	Action
	Click the **Main Menu** button.
	Point to the **Workforce Administration** menu.
	Point to the **Personal Information** menu.
	Click the **Manage Hires** link. 
	Adjust the **From** and **To** fields to reflect the desired time frame. Click in the **From** field.
	In this example, we will change the year to 2010. Enter the desired information into the **From** field. Enter a valid value e.g. "**10**".
	Click the **Refresh** button. 
	Clicking the column heading will sort the names in alphabetical order. Click the **Name** column header.
	Locate the name in the list. Click the scrollbar.
	Click the **Name** link.

Step	Action
	Click the scrollbar.
	Click the **View / Edit Person** link.
	If the employee is transferring positions within the same agency, add rows only if the personal data has changed. Click the **Contact Information** tab. 
	Add rows to update the employee's address, telephone and email addresses if necessary. Click the **Regional** tab. 
	Confirm that the **Ethnic Group** field is entered correctly. Click the **Ethnic Group** look up button to change this value if necessary. In this example, no information was changed. Click the **Cancel** button. 
	Click the **Add Job** button. 
	The **Action** field is automatically populated. Click the **Reason** list.
	Click the **Lateral Transfer Same Agency** list item. 
	Click the **Job Information** tab. 
	Click the **Empl Class** list.
	Click the **Perm Stat** list item. 
	Click the **Job Labor** tab. 
	Review the **Union Seniority Date** field to ensure that the field reflects the employee's original date of hire/rehire. Click the **Payroll** tab.

Step	Action
	Verify that the **Pay Group** field populated correctly. Click the **Compensation** tab. 
	Adjust the biweekly compensation rate if necessary. Click the **Calculate Compensation** button. 
	Click the **Employment Data** link. 
	If necessary, enter the new **Probation Date**. Click the **Benefits Program Participation** link.
	If necessary, change the **BAS Group ID**. Click the **OK** button. 
	End of Procedure.

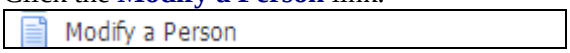
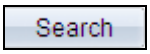
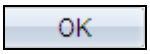
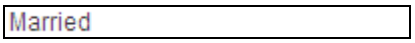
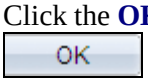
Appendix S: Updating Emergency Contact Information Job Aid

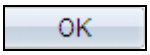
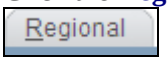
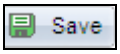
Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Personal Information** menu.
	Point to the **Personal Relationships** menu.
	Click the **Emergency Contact** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 
	Enter the desired information into the **Contact Name** field. Enter a valid value e.g. "**Mary Christmas**".
	Click the **Relationship to Employee** list.

Step	Action
	Click the **Spouse** list item. 
	Click the **Primary Contact** option. 
	Click the **Edit Address** button. 
	Enter the desired information into the **Address 1** field. Enter a valid value e.g. "**2121 Main St**".
	Enter the desired information into the **Address 2** field. Enter a valid value e.g. "**Apt B**".
	Enter the desired information into the **City** field. Enter a valid value e.g. "**Indianapolis**".
	Enter the desired information into the **State** field. Enter a valid value e.g. "**IN**".
	Enter the desired information into the **Postal** field. Enter a valid value e.g. "**46201**".
	Enter the desired information into the **County** field. Enter a valid value e.g. "**Marion**".
	Click the **OK** button. 
	Enter the desired information into the **Phone** field. Enter a valid value e.g. "**317-555-1212**".
	Click the **Other Phone Numbers** tab. 
	RESHOOT THIS SCREEN TO GET ACTION TO LAND IN CORRECT PLACE. Click the **Mobile** list item. 
	Enter the desired information into the **Phone** field. Enter a valid value e.g. "**317-555-2345**".
	Click the **Save** button. 
	End of Procedure.

Appendix T: Updating Personal Information Job Aid

Step	Action
	Click the **Main Menu** link.
	Point to the **Workforce Administration** menu.
	Point to the **Personal Information** menu.

Step	Action
	Click the **Modify a Person** link. 
	Enter the desired information into the **Empl ID** field. Enter a valid value e.g. "**10000280299**".
	Click the **Search** button. 
	Click the **Add a new row** button.
	Update the **Effective Date** field if necessary. Click the **Edit Name** button.
	Enter the desired information into the **Middle Name** field. Enter a valid value e.g. "**Michael**".
	Click the **OK** button. 
	Click the **Add a new row** button.
	Update the **Effective Date** field of necessary. Click the **Marital Status** list.
	Click the **Married** list item. 
	Enter the desired information into the **As of** field. Enter a valid value e.g. "**09/22/2011**".
	Click the **Contact Information** tab.
	Click the **View Address Detail** link.
	Click the **Add a new row** button.
	Change the **Effective Date** field if necessary. Click the **Add Address** link.
	Edit the address as required. Enter the desired information into the **Address 2** field. Enter a valid value e.g. "**Apt B**".
	Click the **OK** button. 

Step	Action
	Click the **OK** button. 
	Add rows or edit the telephone and email information as appropriate. Click the **Regional** tab. 
	Verify that the **Ethnic Group** field is correct. Click the look up button to make a change, if necessary. Click the **Save** button. 
	End of Procedure.